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THE Tobacco SITUATION

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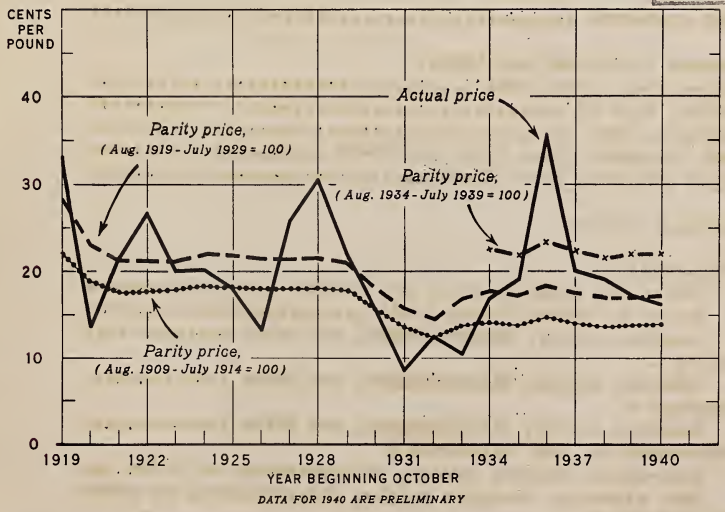
1942 OUTLOOK ISSUE WITH CHARTS

BURLEY TOBACCO: PRICE RECEIVED BY FARMERS AND PARITY PRICES, UNITED STATES, 1919-40



U.S. DEPARTMENT OF AGRICULTURE NEG. 39354 BUREAU OF AGRICULTURAL ECONOMICS

THE CHART ABOVE SHOWS ACTUAL PRICES RECEIVED BY BURLEY GROWERS COMPARED WITH PARITY PRICES AS CALCULATED ON THREE DIFFERENT BASES. THE AUGUST 1909-JULY 1914 BASE, USED FOR MOST MAJOR COMMODITIES, WAS NEVER EMPLOYED FOR TOBACCO. INSTEAD, THE 1933 ACT PROVIDED THAT AUGUST 1919-JULY 1929 BE THE BASE FOR ALL TOBACCO. IN NOVEMBER 1940, THE BASE FOR BURLEY AND FLUE-CURED WAS CHANGED BY LAW TO AUGUST 1934-JULY 1939.

LEGISLATION RECENTLY ENACTED BY CONGRESS REQUIRES LOAN OFFERS TO PRODUCERS OF ALL TOBACCO TYPES ON THE 1941 CROP. THE LAW PROVIDES THAT LOANS MUST BE OFFERED ON TYPES FOR WHICH PRODUCERS HAVE NOT DISAPPROVED MARKETING QUOTAS FOR 1941. ALL TOBACCO QUOTAS RECOMMENDED LAST YEAR WERE APPROVED. LOANS ARE TO BE MADE AT 85 PERCENT OF PARITY TO PRODUCERS WHO ARE COOPERATORS WITH RESPECT TO THE MARKETING QUOTAS. LOANS AT 60 PERCENT OF THIS RATE ARE AVAILABLE TO NON-COOPERATORS, BUT ONLY ON TOBACCO SUBJECT TO PENALTY IF MARKETED.

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THE TOBACCO SITUATION

Summary

The tobacco outlook for 1942 has been considerably improved by events of the last year. Domestic demand for most types has increased notably. Current consumption of tobacco products, especially of cigarettes, is expected to continue to increase. Although normal commercial exports decreased last year to the lowest levels since the 1860's, no further decreases are anticipated and lend-lease shipments of old-crop tobacco will substantially reduce domestically held stocks. No great improvement in exports to the Far East can be expected.

The week market position of flue-cured has improved during the past year, partly because of increases in domestic cigarette consumption and declines in production due to marketing quotas, developments which will continue in 1942. Likewise there should be slight further improvement in domestic consumption of snuff and chewing tobacco, the principal domestic outlets for dark tobaccos. Continued reduction in the production of these types in 1942 through marketing quotas will considerably improve the prospects for more normal marketing conditions in future years.

Anticipated production cuts and increases in domestic consumption for 1942 also serve to improve Burley prospects. The extremely high prices received for Maryland tobacco this year indicate that the marked increase in domestic demand may be at least partly maintained next year. Although no predictions may be ventured as to production of the various cigar types, expected high levels of consumption of cigars and scrap-chewing tobacco suggest a generally favorable 1942 outlook.

The total 1941 tobacco crop in the United States, as indicated September 1, is estimated at 1,255,865,000 pounds, - 13.5 percent less than 1940 production and 33.0 percent less than the record 1939 crop. Most of the decrease in each of the last 2 years came in flue-cured production, which is estimated at only 647,657,000 pounds for 1941, about 14 percent below last year.

Flue-cured prices this season have been considerably higher than in the preceding months since the outbreak of war in Europe, and present indications based on sales of over half the crop point to a season average price of 23 to 25 cents. Several factors contribute to this higher level of prices: A short crop of good smoking quality; increases in domestic consumption; the evident desire of domestic manufacturers to outbid other buyers and build heavy inventories at this time; and recognition that marketing quotas and general economic conditions may prevent any substantial extension of production next year. With present prices Commodity Credit Corporation purchases this year may not exceed 100 million pounds, compared with 200.8 million pounds last year.

Exports of flue-cured last year decreased to the lowest levels since before World War I. Toward the end of the year lend-lease shipments of old-crop tobacco owned or controlled by the Commodity Credit Corporation were begun, and these exports are continuing in substantial volume. Domestic consumption continues to increase, mainly on account of large increases in cigarette consumption. The total indicated supply is 2,240.6 million pounds as compared with 2,165.5 million pounds a year ago. Exclusive of stocks owned or controlled by the Commodity Credit Corporation, the total supply is lower this year than last.

The supply of Burley is expected to be about the same as a year ago. The smaller crop indicated on September 1 is expected to be about balanced

by an increase in October 1 stocks as compared with last year. Domestic consumption is increasing, and present estimates are for a crop slightly below disappearance last year.

The estimated January 1 supply of Maryland shows an increase over the preceding year. In spite of the continued low level of exports, the strong market this year shows that increased domestic demand has more than compensated for the closing of European outlets. Prices this year, with marketing of the 1940 crop almost concluded, are the highest on record, and the cash value of the crop likewise will set a new high.

Much smaller fire-cured and dark air-cured crops are expected this year, with growers of all these types (except Virginia sun-cured) operating under marketing quotas which sharply reduced plantings. In spite of large stock increases, fire-cured supplies on October 1 are expected to be only 3 percent larger than a year ago, and dark air-cured supplies are expected to be about the same as in 1940. Exports of both fire-cured and dark air-cured tobaccos continued to decline throughout the past year.

The September 1 crop estimate gives total cigar leaf production as 142.2 million pounds, slightly less than production last year. The condition of the crop appears to be good, and with increased cigar and scrap-chewing consumption, marketing prospects are favorable.

- September 27, 1941

FLUE-CURED TOBACCO, TYPES 11-14

Smaller Crop; Prices Much Higher Than in 1940

The 1941 crop of all flue-cured types indicated as of September 1 totals 647.7 million pounds, about 14 percent less than the 1940 crop of 755.8 million pounds. With acreage plantings slightly larger, yields are down sharply from last year. The total supply, estimated to be 2,240.6 million pounds, continues to increase. Prices on all markets have averaged about 30 to 50 percent higher than last year's average market prices of the respective types. The crop is reported to be of excellent quality for cigarette purposes.

Types 13-14 Sales Completed

The Georgia-Florida markets (type 14) opened on August 5, and final sales were held on August 22. Producers' sales for the season in Georgia and Florida totaled 61,813,150 pounds, a decline of 29 percent from the 87,141,976 pounds marketed in this area last year. The indicated Georgia-Florida auction sales represent 98 percent of the total type 14 flue-cured crop of 62,872,000 pounds estimated by the Crop Reporting Board as of September 1. Of these producers' sales, 56,086,028 pounds were marketed in Georgia, and 5,727,122 represented Florida sales. The average price for the 1941 crop of 20.4 cents per pound represents an increase of about 30 percent over last year's season average of 15.7 cents in this area. Prices increased in practically all grade groups, and prices for almost all grades except the lowest qualities in each group increased by about 30 to 40 percent. A few green grades and all nondescript showed declines from last year. Cigarette grades were especially favored, and purchases by domestic manufacturers were unusually heavy. In general, market prices were maintained throughout the selling season and did not show the usual season-end declines. There was a very low proportion of rejections, indicating general satisfaction by growers with the prices received.

Type 13 markets opened August 12 with large deliveries and heavy sales. First hand sales during August totaled 82.6 million pounds, at an average price of 26.6 cents, as compared with last year's August sales of this type of 52.9 million pounds at 18.4 cents. South Carolina sales were 39.0 million pounds, and sales in North Carolina 43.6 million pounds. Deliveries to auction floors were heavy from the first of the season, and with the short crop and high prices marketing progressed rapidly. Most markets closed on September 12, though sales continued on some floors. This may be the first time in many years that the type 13 selling season has been completed without sales in October. Average prices fell off toward the end of the marketing season, largely because fair to common grades and nondescript constituted the bulk of deliveries. However, after September 1 the prices of almost all grades eased off slightly for 2 weeks and then showed a number of gains, suggesting revisions in buyers' estimates of market conditions. The September 1 crop report indicated total production of type 13 as 121.5 million pounds. Through September 18 gross sales as reported by the Agricultural Marketing Service totaled 132.6 million pounds.

Types 11a, 11b, and 12 Now Selling

Eastern North Carolina markets for type 12 opened on August 26, with prices considerably above those of last year. The first 4 days of sales brought average prices of 26.8 cents for 30.8 million pounds. There were no August sales of this type in 1940, but the 1940 warehouse sales averaged 17.9 cents, an indication of the nature of the advance. September 1 estimates indicate the 1941 type 12 crop to be 232.8 million pounds, 15 percent less than the 1940 production of 274.4 million pounds.

Middle Belt markets for type 11b opened on September 9. For the first week gross sales averaged 29.5, as compared with an average for all sales a year ago of 18.0 cents. The volume of sales was somewhat smaller than in 1940, reflecting the smaller crop. Early offerings were mainly medium qualities of primings and lugs, principally the former.

The Old Belt markets for type 11a opened September 16, with prices markedly above those of last year and comparable to the increases for types 11b-14. For the first week gross sales averaged 28.8 cents, 11.4 cents higher than during the opening week last season. The very small number of rejections indicated general satisfaction with prices. The estimated production as of September 1 for type 11 as a whole (Old Belt and Middle Belt) is 230.5 million pounds, a decline of 7 percent from the 247.5 million-pound crop in 1940.

Weather, Low Yields, Cause Short Crop

The decrease in the crop came wholly from a decline in average yields from last year's record high of 1,027 pounds per acre to an indicated 1941 yield of 866 pounds. (This is about the same as the 1935-39 average yield of 874 pounds.) The sharpest decline, almost 29 percent, was in Georgia, with smaller declines in the type 13 area, and still smaller in type 12. The North Carolina Old Belt appears to have suffered least, with an 8 percent decline in yields, whereas the Old Belt in Virginia has an indicated 16 percent decline.

A number of unfavorable weather conditions combined to produce these relatively low yields: Dry weather at setting time, and abnormally heavy rains early in the summer, followed by hot, dry weather which caused premature ripening of much of the crop. The net result is a flue-cured crop indicated to be the smallest since 1934.

Value of 1941 Crop Above that of 1940

With the higher level of prices, the much smaller 1941 production of 647.7 million pounds probably will bring returns somewhat above $150,000,000. This compares with returns of $124,000,000 for the larger 1940 crop. The average 1934-38 returns were about $168,000,000.

Commodity Credit Corporation Purchases Small

Because of the high prices prevailing in all flue-cured markets, relatively little tobacco has been purchased through the Commodity Credit Corporation. A program similar to that of last year, of purchases through foreign buyers customarily operating and through domestic dealers for export, had been set up. However, bidding by other buyers has generally been above the rates prescribed in the Corporation's contracts, and it is evident that the purchase allotments will not be filled. As of September 20, about 66 million pounds had been purchased under the Corporation's program, at an average price of 22.6 cents per pound. By this date over one-half of the indicated crop had been sold.

Government Grading More Extensive

With the addition of 12 new markets, voted by growers in referenda held July 24-26, Government inspection on flue-cured markets has a much broader coverage now than a year ago. Out of 75 flue-cured markets in operation this year, the Government inspection and market news service are available on 26 markets. These are divided among the types as follows: Type 11a, 2 markets; type 11b, 3 markets; type 12, 7 markets; type 13, 6 markets; and type 14, 8 markets.

Flue-cured tobacco: Price per pound received for warehouse sales in Georgia, North Carolina, South Carolina, and Virginia, by types and months, 1933-34 to 1941-42

Type and year	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Type 11:									
1933-34		9.8	10.3	14.9	18.7	16.9	14.3	13.7	6.9
1934-35		25.2	27.8	32.3	28.1	18.7	16.0	9.0	
1935-36		19.7	18.1	22.0	21.3	17.4	14.4	9.5	
1936-37			24.8	23.5	23.3	19.4	17.4	13.5	
1937-38			25.9	26.2	22.9	17.2	14.0	12.0	
1938-39		22.6	21.8	24.5	21.1	16.4	14.2		
1939-40			12.8	15.6	16.7	13.3	10.6	8.4	
1940-41			19.4	19.3	14.3	12.4			
1941-42									
Type 12:									
1933-34		10.4	11.5	15.5	20.2	17.6	15.2	9.2	
1934-35		26.2	27.8	35.0	28.1	14.4			
1935-36		19.2	18.9	23.8	20.3	15.5			
1936-37			21.5	24.9	21.9	12.6			
1937-38		21.7	22.0	29.7	24.1	15.6			
1938-39		22.7	21.8	25.8	19.8				
1939-40		15.0	12.6	17.0	17.4	13.4			
1940-41		16.3	20.2	14.8					
1941-42		26.8							
Type 13:									
1933-34		12.9	13.0	12.5	12.2				
1934-35		24.1	21.0	19.0					
1935-36		21.7	17.9	16.4					
1936-37		23.2	21.1	14.5					
1937-38		23.8	20.3	18.1					
1938-39		24.2	19.4	15.3					
1939-40		16.4	12.8	12.1	11.9				
1940-41		18.4	13.9	12.4					
1941-42		26.6							
Type 14:									
1933-34		11.3							
1934-35		18.7							
1935-36		18.9							
1936-37		21.0							
1937-38	25.2	18.6							
1938-39	26.8	19.2							
1939-40	14.6	12.1							
1940-41		15.6							
1941-42		20.4							

Compiled from monthly warehouse sales reports from each State.

Season average prices per 100 pounds of flue-cured tobacco, by grades, on representative markets, 1940-41

Type 12

U. S. standard grade 1/	Crop of - 1940	Crop of - 1941 2/	Change	U. S. standard grade 1/	Crop of - 1940	Crop of - 1941 2/	Change
	Dollars	Dollars	Percent		Dollars	Dollars	Percent
Leaf:				Lugs:			
B2L	33.00	42.00	+27.3	X1L	31.00	39.00	+25.8
B3L	29.00	39.00	+34.5	X1F	30.00	39.00	+30.0
B2F	31.00	40.00	+29.0	X2L	29.00	38.00	+31.0
B3F	26.00	37.00	+42.3	X2F	28.00	38.00	+35.7
B4L	25.00	37.00	+48.0	X3L	26.00	36.00	+38.5
B4F	21.50	33.00	+53.5	X3F	23.50	35.00	+48.9
B4R	17.50	27.00	+54.3	X3GL	15.50	24.00	+54.8
B4GL	17.50	26.00	+48.6	X3GF	14.50	22.00	+51.7
B4GF	15.50	24.50	+58.1	X4L	19.50	30.00	+53.8
B5L	20.50	32.00	+56.1	X4F	17.00	28.00	+64.7
B5F	16.50	27.00	+63.6	X4GL	10.75	18.00	+67.4
B5R	12.75	21.50	+68.6	X4GF	9.75	17.00	+74.4
B5GL	13.50	21.00	+55.6	X5L	11.75	21.00	+78.7
B5GF	11.25	18.50	+64.4	X5F	10.00	18.00	+80.0
B6L	13.50	24.00	+77.8	X5GF	6.75	11.00	+63.0
B6F	11.00	19.00	+72.7	Primings:			
B6R	8.50	13.75	+61.8	P1L	29.00	39.00	+34.5
B6GL	9.25	14.75	+59.5	P1F	29.00	38.00	+31.0
B6GF	7.75	12.25	+58.1	P2L	27.00	38.00	+40.7
Smoking leaf:				P2F	27.00	37.00	+37.0
H2F	31.00	40.00	+29.0	P3L	24.00	35.00	+45.8
H3F	28.00	38.00	+35.7	P3F	22.50	33.00	+46.7
H4F	24.00	36.00	+50.0	P3G	12.25	19.00	+55.1
H5F	19.00	32.00	+68.4	P4L	16.50	26.00	+57.6
H5R	15.00	26.00	+73.3	P4F	14.25	22.50	+57.9
H6F	13.25	23.00	+73.6	P4G	8.50	13.50	+58.8
H6R	10.50	16.50	+57.1	P5L	9.75	16.50	+69.2
Cutters:				P5F	8.25	12.75	+54.5
C2L	38.00	44.00	+15.8	P5G	6.50	8.00	+23.1
C3L	33.00	42.00	+27.3	Nondescript:			
C3F	33.00	41.00	+24.2	N1G	5.75	7.25	+26.1
C4L	31.00	40.00	+29.0				
C4F	31.00	39.00	+25.8				
C5L	29.00	39.00	+34.5				
C5F	28.00	38.00	+35.7				

Continued -

Season average prices per 100 pounds of flue-cured tobacco, by grades, on representative markets, 1940-41 -Continued

Type 13

U. S. standard grade 1/	Crop of - 1940	Crop of - 1941 2/	Change	U. S. standard grade 1/	Crop of - 1940	Crop of - 1941 2/	Change
	Dollars	Dollars	Percent		Dollars	Dollars	Percent
Leaf:				Lugs:			
B2F	28.00	38.00	+35.7	X1L	28.00	38.00	+35.7
B2L	29.00	39.00	+34.5	X1F	26.00	38.00	+46.2
B3L	26.00	37.00	+42.3	X2L	26.00	37.00	+42.3
B3F	23.50	36.00	+53.2	X2F	24.00	36.00	+50.0
B3GL	19.50	24.00	+23.1	X3L	22.50	34.00	+51.1
B4L	22.50	34.00	+51.1	X3F	20.50	32.00	+56.1
B4F	19.00	31.00	+63.2	X3GL	13.25	20.25	+52.8
B4R	13.75	24.00	+74.5	X3GF	11.50	19.00	+65.2
B4GL	15.00	22.50	+50.0	X4L	16.00	26.60	+62.5
B4GF	13.00	20.00	+53.8	X4F	13.75	22.50	+63.6
B5L	17.50	28.00	+60.0	X4GL	10.50	14.25	+35.7
B5F	14.00	23.50	+67.9	X4GF	9.00	13.50	+50.0
B5R	10.25	17.00	+65.9	X5L	10.25	16.50	+61.0
B5GL	11.00	17.00	+54.5	X5F	9.00	13.25	+47.2
B5GF	9.75	15.50	+59.0	X5GL	7.75	9.50	+22.6
B6L	11.00	18.00	+63.6	X5GF	7.25	8.25	+13.8
B6F	8.75	14.00	+60.0	Primings:			
B6R	7.50	10.00	+33.3	P1L	27.00	37.00	+37.0
B6GL	8.50	11.25	+32.4	P1F	27.00	37.00	+37.0
B6GF	7.25	9.50	+31.0	P2L	25.00	36.00	+44.0
Smoking leaf:				P2F	24.50	35.00	+42.9
H2F	28.00	38.00	+35.7	P3L	22.00	33.00	+50.0
H3F	25.00	37.00	+48.0	P3F	20.00	29.00	+45.0
H4F	20.50	33.00	+61.0	P3G	13.00	18.50	+42.3
H5F	15.50	25.00	+61.3	P4L	15.00	25.00	+66.7
H5R	13.00	20.00	+53.8	P4F	13.25	21.00	+58.5
H6F	10.25	16.00	+56.1	P4G	9.50	12.00	+26.3
H6R	8.25	11.75	+42.4	P5L	10.00	14.25	+42.5
Cutters:				P5F	8.50	10.50	+23.5
C3F	30.00	39.00	+30.0	P5G	7.25	8.00	+10.3
C2L	33.00	41.00	+24.2	Nondescript:			
C3L	30.00	39.00	+30.0	N1G	6.00	6.00	0.0
C4L	29.00	38.00	+31.0	N2G	5.00	4.25	-15.0
C4F	27.00	38.00	+40.7				
C5L	27.00	37.00	+37.0				
C5F	25.00	37.00	+48.0				

Continued -

Season average prices per 100 pounds of flue-cured tobacco, by grades, on representative markets, 1940-41 -Continued

Type 14

U. S. standard grade 1/	Crop of - 1940	Crop of - 1941	Change	U. S. standard grade 1/	Crop of - 1940	Crop of - 1941	Change
	Dollars	Dollars	Percent		Dollars	Dollars	Percent
Leaf:				Lugs, contd.:			
B2L	25.00	33.00	+32.0	X3L	22.00	30.00	+36.4
B3L	23.50	32.00	+36.2	X4L	18.00	23.50	+30.6
B4L	21.50	29.00	+34.9	X5L	12.50	15.00	+20.0
B5L	17.50	24.50	+40.0	X3LV	19.00	25.00	+31.6
B6L	11.50	15.50	+34.8	X4LV	15.50	21.50	+38.7
B3LV	21.50	29.00	+34.9	X1F	25.00	33.00	+32.0
B4LV	18.50	25.00	+35.1	X2F	23.50	32.00	+36.2
B5LV	14.75	21.00	+42.4	X3F	21.00	28.00	+33.3
B3F	21.50	30.00	+39.5	X4F	15.50	20.00	+29.0
B4F	18.00	26.00	+44.4	X5F	10.25	10.75	+ 4.9
B5F	13.75	19.50	+41.8	X3FV	17.50	23.50	+34.3
B6F	9.25	11.75	+27.0	X4FV	14.00	18.50	+32.1
B4FV	15.50	22.00	+41.9	X3FK	17.50	23.00	+31.4
B5FV	11.75	16.50	+40.4	X4FK	12.75	14.25	+11.8
B4FK	14.50	19.00	+31.0	X3GL	15.00	20.50	+36.7
B5FK	11.25	15.50	+37.8	X4GL	12.25	15.00	+22.4
B5R	9.75	12.50	+28.2	X5GL	8.75	9.25	+ 5.7
B6R	7.25	7.75	+ 6.9	X3GF	13.75	21.00	+52.7
B4GL	15.00	21.00	+40.0	X4GF	11.00	12.50	+13.6
B5GL	11.75	15.50	+31.9	X5GF	8.25	8.00	- 3.0
B6GL	8.75	10.00	+14.3	Primings:			
B4GF	13.25	19.00	+43.4	P1L	24.50	34.00	+38.8
B5GF	10.00	13.50	+35.0	P2L	23.50	32.00	+36.2
B6GF	7.50	8.00	+ 6.7	P3L	21.00	29.00	+38.1
Smoking Leaf:				P4L	17.00	22.00	+29.4
H3F	22.50	32.00	+42.2	P5L	11.25	12.50	+11.1
H4F	21.00	29.00	+38.1	P1F	24.00	34.00	+41.7
H5F	16.50	21.50	+30.3	P2F	23.00	32.00	+39.1
H6F	12.00	13.25	+10.4	P3F	20.00	27.00	+35.0
H6R	9.00	9.50	+ 5.6	P4F	14.75	18.00	+22.0
Cutters:				P5F	9.75	9.50	- 2.6
C3L	26.00	35.00	+34.6	P3G	15.50	21.00	+35.5
C4L	25.00	34.00	+36.0	P4G	10.50	12.75	+21.4
C5L	24.00	33.00	+37.5	P5G	8.50	7.00	-17.6
C4LV	23.00	31.00	+34.8	Nondescript:			
C5LV	21.00	30.00	+42.9	N1L	6.75	5.25	-22.2
C4F	25.00	33.00	+32.0	N2L	4.75	3.25	-31.6
C5F	23.00	32.00	+39.1	N1R	6.50	5.50	-15.4
C5FV	21.50	28.00	+30.2	N2R	4.75	3.75	-21.1
Lugs:				N1G	6.00	5.00	-16.7
X1L	25.00	34.00	+36.0	N2G	4.75	3.50	-26.3
X2L	24.00	33.00	+37.5				

1/ Key to standard grade marks for flue-cured tobacco:

Group	Quality	Color	Special Factor
A- Wrappers	1 - Choice	L - Lemon	G - Green	V - Greenish
B - Leaf	2 - Fine	F - Orange	(L) Lemon side	M - Mixed
H - Smoking Leaf	3 - Good	R - Red	(F) Orange side	K - Variegated
C - Cutters	4 - Fair	D - Dark Red	(R) Red side	W - Unsafe order
X - Lugs	5 - Low			U - Unsound
P - Primings	6 - Common			
N - Nondescript				

2/ Season through September 18, 1941.

Compiled from Market News Reports of the Agricultural Marketing Service.

Commodity Credit Corporation Offers, to Buy 1939 Tobacco

The Commodity Credit Corporation has asked for bids on 1939 crop tobacco suitable for the British trade, at prices not to exceed cost plus all carrying charges. The offer was limited to 10 million pounds. Very few bids were received and these covered insignificant quantities.

Marketing Quotas to be About Same for 1942

Flue-cured producers are now operating under a 3-year production adjustment program approved in 1940. It is expected that a marketing quota proclamation will be issued covering the 1942 crop. Allotments, probably will be about the same as for 1941. The Department's suggested acreage goal for 1942 is 762,000 acres, almost identical with the 1941 allotments.

Exports for Year Decline; Increase Probable

Exports of flue-cured tobacco for the 1940 crop year totaled 135.5 million pounds, a decline of more than 46 percent from the already low figure of 252.2 million pounds exported in 1939. This is the smallest export since the figures by types became available in 1923, and about the size of estimates of our exports just prior to 1914 when consumption abroad was at a materially lower level than in recent years. Exports for July of this year, the latest available figure, were 23.5 million pounds as compared with 11.4 million in July 1940.

Since export data by countries are no longer being released, it is not possible to give a detailed analysis of current trends. However, it is clear that increases in present shipments are due largely to lend-lease exports, which are from stocks of old-crop leaf owned or controlled by the Commodity Credit Corporation. Such shipments are expected to continue in substantial volume during the coming year.

No change from the low level of normal commercial shipments is in prospect. As noted in previous issues, prospects for increased exports to the Far East are not encouraging.

Cigarette Withdrawals on High Level

As measured by tax-paid withdrawals, cigarette consumption for the year ended June 1941 has increased about 7 percent over the high level of 1940. The Federal Reserve Board index of cigarette production reached an all-time high of 144 in June, and then declined to 138 in July (1935-39=100). Cigarette withdrawals bear strongly on the prospects for flue-cured leaf, since cigarettes furnish the major outlet for this type. Next year should see continued marked increases, though perhaps at a smaller rate of gain.

Manufactured smoking tobacco, the second most important domestic use for flue-cured, showed a 1.7 percent increase in production for the 12 months ended June 30, 1941 as compared with the same period a year ago. This rate of increase may be maintained during the coming year.

Privately Controlled Stocks, Supply, Down

The estimated total supply of flue-cured on July 1, 1941 was the largest on record, higher by 75.1 million pounds than a year ago. However, nearly 200.0 million pounds of the supply represented increases in stocks owned or controlled by the Commodity Credit Corporation over the previous year. If this is deducted the remainder or "total free supply" is lower than a year ago, and if all Corporation stocks held on July 1, 1941 are subtracted, the total free supply is lower than on July 1, 1939. Privately controlled stocks, however, are about the same this year as they were a year ago, and about one-third larger than on July 1, 1939.

Flue-cured disappearance in 1940 declined to 572.6 million pounds, as compared with 705.4 million pounds in 1939. The decline is entirely accounted for by the decline in exports, if allowance is made for weight shrinkage in reported exports. Even with the small current crop indicated by September 1 estimates, production currently still exceeds disappearance. If lend-lease exports attain their expected levels, however, disappearance this year should be larger than current production.

Flue-cured tobacco: Domestic supply, disappearance, and season average price, average 1934-38, annual 1938-41 1/

Year	Production	Stocks, July 1	Total supply	Disappearance: year beginning July	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	740.6	844.9	1,585.5	703.9	22.9
1938	785.7	954.5	1,740.2	793.9	22.2
1939	1,168.8	946.3	2,115.1	705.4	14.9
1940 2/	755.8	1,409.7	2,165.5	572.6	16.4
1941 2/	3/ 647.7	1,592.9	2,240.6	---	---

1/ Farm-sales-weight equivalent.
2/ Preliminary.
3/ Indicated Sept. 1.

BURLEY TOBACCO, TYPE 31

Burley Crop Estimated Smaller Than in 1940

As of September 1, the 1941 Burley crop is estimated to be 328.5 million pounds. This would be about 13 percent smaller than the 375.5 million pounds produced in 1940.

Decreased yields accounted for the reduced crop, acreage planted having increased slightly. Kentucky and Tennessee, the major producing areas, suffered about equally. The Crop Reporting Board states that the Kentucky crop shows "an extreme range of condition and probable yield", due to

spotty rainfall. There are almost two distinct crops this year, because of different times of setting plants. The early tobacco ripened rapidly under heavy rains shortly after planting. The later settings grew largely under dry weather conditions, and the tobacco still in the fields as of September 1 had good yield prospects.

Extension of Government Market Servies Possible

A referendum will be held among Burley growers on October 2-4 to decide on the extension of Government inspection (grading) and market news service to all Burley markets. If approved, the Government will inspect all Burley offered on auction markets this year, and the market news service will be expanded accordingly.

It is unofficially reported that the Lexington market will open this year on December 1 and the other Burley markets on December 2.

Production Goal May be Decreased

It is expected that the Secretary will shortly proclaim a marketing quota for the 1942 Burley crop, in view of the unfavorable supply situation.

The suggested 1942 production goal calls for a reduction from the 1941 acreage allotment by the full amount permitted by existing legislation. This would result in a cut of slightly less than 10 percent, after providing for exemptions of farms with allotments of less than 1 acre.

Indicated Supply About Same as in 1940

It is estimated that the decline in the indicated 1941 crop will be almost exactly compensated by an increase in October 1 stocks from 762.3 million pounds in 1940 to about 805.0 million pounds this year. This would give an October 1 supply estimate of 1,133.5 million pounds as compared with 1,137.8 million pounds a year ago.

Disappearance for the past year, estimated on this basis, would be 332.8 million pounds, an increase of 14.7 million pounds from the 1939 disappearance and the first sizeable increase since 1936. Since Burley exports, always a minor factor, have decreased, the larger disappearance indicates a substantial increase in the domestic use of this type.

Domestic Consumption Outlook Favorable

The estimated increases in disappearance are in line with the evidence provided by substantial increases in tax-paid withdrawals of cigarettes and smaller increases in the manufacture of other tobacco products using Burley leaf. Since these general trends are expected to continue, the outlook for Burley disappearance in the immediate future is favorable.

During the first 10 months of the marketing year beginning October 1940, exports of Burley totaled 4,071,660 pounds. This represents a sharp percentage decline from the 9,308,893 pounds exported during the same period

in 1939, but the absolute size of the decline is relatively unimportant in the Burley situation taken as a whole.

Much of Co-op Holdings Sold

The Burley Tobacco Growers Co-operative Association recently announced the sale of most of their holdings taken under the loan program of the Commodity Credit Corporation last year. The Association has left about 4.0 million pounds of the 26.2 million pounds received under this program.

Trade reports indicate considerable movement of old crop stocks out of the hands of private dealers.

Burley tobacco: Domestic supply, disappearance, and season average price, average 1934-38, annual 1938-41 1/

Year	Production	Stocks Oct. 1	Total supply	Disappearance, year beginning Oct.	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	286.9	700.9	987.8	314.2	22.2
1938	339.4	660.7	1,000.1	316.0	19.0
1939	396.3	684.1	1,080.4	314.1	17.3
1940 2/	375.5	762.3	1,137.8	3/ 332.8	16.2
1941	4/ 328.5	3/ 805.0	3/ 1,133.5	---	---

1/ Farm-sales-weight equivalent. 2/ Preliminary. 3/ Estimated.
4/ Indicated Sept. 1.

MARYLAND TOBACCO, TYPE 32

1941 Crop About Same as Last Year

The condition of the Maryland crop declined slightly during August, and September 1 indications are for a 1941 crop totaling 31.3 million pounds. This is only 2 percent below the 1940 crop of 31.9 million pounds now being sold. The yield is estimated at 800 pounds per acre, as compared with 840 last year. There was a small increase in the acreage planted this year.

1940 Crop Sells at Record Prices

Through August 31 sales of the 1940 crop on the auction markets and on the Baltimore hogshead market totaled 31,368,017 pounds. The average price for sales during the first 8 months of the calendar year was 33.3 cents. The highest average season price on record for Maryland leaf is 30.0 cents, reached in 1918. With little leaf still to be marketed, it is evident that a new record high price was paid for the 1940 Maryland crop. Cash returns to growers will be the largest recorded, about 10.0 million dollars as compared with a previous high of 7.8 million dollars for the 1936 crop.

Auction Warehouses Close September 5

The six auction warehouses at Upper Marlboro, Hughesville, La Plata, and Waldorf all closed for the season on September 5. This was their third year of operation, and almost exactly three-fourths of all first-hand sales for the first 8 months of the year passed over their floors. The Baltimore hogshead market probably will remain open at least through October.

With 31.4 million pounds already sold, only relatively small amounts of the crop are yet to be marketed. However, it appears likely that the Crop Reporting Board estimate of 31.9 million pounds for the 1940 crop may be slightly exceeded.

Supply in 1942 Will be Slightly Larger

Despite the decline in September 1 crop indications as compared with the previous months, it is still expected that the total supply on January 1 will be slightly larger than on January 1, 1941. This is based on an estimate of stocks for that date of 47.0 million pounds. However, disappearance has increased, and on the evidence of strong market behaviour this year the increased stocks and supply furnish no cause for concern.

There has been no material change in the export situation. Although July exports of 525,656 pounds were the largest in 5 months, such occasional upswings probably have little significance for the immediate future. Exports during the first 7 months of 1941 totaled 1,258,000 pounds, little changed from the 1,309,000 pounds exported during the same period in 1940. The 1940 figure had already reflected the loss of major continental European markets, and was about 40 percent of the average 1935-39 export.

Domestic Consumption Increases

With exports little changed, present indications are that the improvement in disappearance will come from increased domestic consumption. Likewise this points to a marked increase in domestic demand in this year's markets. This increase is largely based upon present increases in cigarette consumption, and probably upon plans to increase somewhat the usage of Maryland in cigarette blends. There have been a number of unconfirmed reports that some manufacturers are planning to increase their use of Maryland leaf while economizing on the use of imported cigarette tobaccos.

Farmers are evidently pleased with market prices this year. However, any plans for expansion of acreage next year will be partially determined by possible alternative agricultural and nonagricultural employment of the necessary resources.

Maryland tobacco: Domestic supply, disappearance, and season average price, average 1934-38, annual 1938-41 1/

Year	Production	Stocks, Jan. 1 of following year	Total supply	Disappearance, following calendar year	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Average 1934-38	27.5	38.4	65.9	27.5	19.7
1938	29.2	37.7	66.9	30.6	18.5
1939	32.8	36.3	69.1	25.9	21.1
1940 2/	31.9	43.2	75.1	3/ 28.1	4/ 33.3
1941	5/ 31.3	3/ 47.0	3/ 78.3	---	---

1/ Farm-sales-weight equivalent. 2/ Preliminary. 3/ Estimated. 4/ Indicated by sales data. 5/ Indicated Sept. 1.

FIRE-CURED AND DARK AIR-CURED TOBACCOS, TYPES 21-24 AND 35-37

Condition of Crops Improve, but Crop Much Smaller Than in 1940

Both fire-cured and dark air-cured groups experienced favorable weather during August, and as a result prospects are somewhat improved over a month ago. Production of all types has decreased greatly from a year ago; however, principally because of smaller plantings ensuing from the adoption of marketing quotas, for 1941-43, and secondarily because of a reduction in per acre yields in all important areas producing fire-cured.

The total fire-cured crop indicated September 1 was 73.7 million pounds, about 29 percent less than the 1940 crop. The Virginia crop (type 21) estimate was 13.3 million pounds, as compared with 18.7 million a year ago. The Kentucky-Tennessee crop (types 22-24) report shows production to be 60.4 million pounds, as compared with 84.8 million in 1940. Decreased yields were added to the effect of production adjustment, particularly in type 23, where the crop has made its growth under somewhat dry conditions.

As of September 1, production of the dark air-cured group is estimated at 32.6 million pounds, a decline of 23 percent from the 42.2 million pounds produced in 1940. This reduction resulted entirely from the smaller plantings induced by marketing quotas. With the exception of the small Virginia sun-cured crop, for which no marketing quotas were in effect, per acre yields all increased. The indicated September 1 yield of type 35 (One Sucker), 918 pounds per acre, would be the largest on record, the estimated yield in Kentucky having been increased 25 pounds over a month ago as a result of recent highly favorable growing conditions.

Stocks Dark Tobaccos Expected to Show Increase

It is estimated that as of October 1, stocks of fire-cured tobacco will total 179.0 million pounds, about one-fourth more than on the same date

last year. A smaller increase in dark air-cured stocks, 9.4 million pounds, or about 14 percent more than on October 1, 1940, is also anticipated.

The increase in fire-cured stocks should more than balance the reduced production, resulting in a slightly larger supply this year than last. In the case of dark air-cured tobaccos, the larger stocks probably will be compensated by the reduced production, leaving the supply about the same as on October 1, 1940.

Disappearance Decline Due to Reduced Exports

Disappearance of both groups of dark tobaccos is expected to decline. For fire-cured, a drastic decline is anticipated, from 91.8 million pounds in 1939 to 66.1 million pounds last year. For dark air-cured, the change should not be so great, from 34.1 million pounds in 1939 to 32.8 million in 1940. In both cases the decreases can be ascribed to the continued decline in exports.

For the first 10 months of the year, the reported weight of fire-cured exports was 13.8 million pounds, only 41.7 percent of 1939 exports, which had already been affected by the closing of continental European markets. For the same period, dark air-cured exports dropped about 40 percent, from 2.5 million pounds to 1.5 million pounds, and exports of Black Fat, and dark African dropped 35 percent, from 4.9 million to 3.2 million pounds.

No fundamental change in the current export situation is anticipated before the end of the crop year. However, no further decreases are in prospect for next year and possible moderate shipments of old-crop tobacco to British Empire areas under the terms of the Lend-Lease Act should be reflected in some increase in total exports.

Snuff Withdrawals, Chewing Manufactures Up

Snuff withdrawals, the best single index of domestic use of fire-cured, continue to increase. The year ended June 30, 1941 showed a 1.5 percent increase over the year before. The July-August figures show a somewhat noteworthy increase of 9.2 percent over the year before.

Dark air-cured is used largely in manufactured tobacco. Plug chewing showed a 1.2 percent decline for the year ended June 30, 1941, and then increased for the next 2 months as compared with a year ago. Long-cut is included in the smoking tobacco classification, which showed sustained small increases. The manufacture of twist held its own during the last fiscal year, and during the first 2 months of this fiscal year increased 14.9 percent as compared with the previous year. On balance, it seems probable that the domestic use of dark air-cured increased somewhat during the year.

These slightly higher levels of domestic consumption for the dark types should be maintained during the next year, and it is probable that moderate increases will occur.

Dark tobaccos: Domestic supply, disappearance, and season average price, average 1934-38, annual 1938-41 1/

Year	Production	Stocks Oct. 1	Total supply	Disappearance, year beginning Oct.	Average price per pound
	TOTAL ALL DARK TOBACCOS				
Fire-cured, types 21-24, and dark air-cured, types 35-37	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average 1934-38	145.2	257.0	402.2	161.4	10.0
1938	113.8	228.7	342.5	150.2	8.1
1939	140.8	192.3	333.1	125.9	9.5
1940 2/	145.7	207.2	352.9	3/ 98.9	8.8
1941	4/ 106.3	3/ 254.0	3/ 360.3	---	---
	FIRE-CURED				
Total, types 21-24					
Average 1934-38	110.0	194.2	304.2	122.7	10.2
1938	81.0	168.3	249.3	113.1	8.2
1939	97.2	136.2	233.4	91.8	10.5
1940 2/	103.5	141.6	245.1	3/ 66.1	9.3
1941	4/ 73.7	3/ 179.0	3/ 252.7	---	---
	DARK AIR-CURED				
Total, types 35-37					
Average 1934-38	35.2	62.8	98.0	38.7	9.4
1938	32.8	60.4	93.2	37.1	8.0
1939	43.6	56.1	99.7	34.1	7.3
1940 2/	42.2	65.6	107.8	3/ 32.8	7.7
1941	4/ 32.6	3/ 75.0	3/ 107.6	---	---
One Sucker, type 35					
Average 1934-38	16.6	30.8	47.4	17.8	8.9
1938	15.8	33.6	49.4	20.5	5.9
1939	22.3	28.9	51.2	19.3	6.5
1940 2/	21.6	31.9	53.5	3/ 18.5	7.5
1941	4/ 17.4	3/ 35.0	3/ 52.4	---	---
Green River, type 36					
Average 1934-38	15.9	29.3	45.2	18.3	9.7
1938	14.8	23.6	38.4	14.2	9.6
1939	18.0	24.2	42.2	12.1	7.4
1940 2/	17.5	30.1	47.6	3/ 11.6	7.6
1941	4/ 12.6	3/ 36.0	3/ 48.6	---	---
Va. sun-cured, type 37					
Average 1934-38	2.7	2.7	5.4	2.6	11.5
1938	2.2	3.2	5.4	2.4	12.7
1939	3.3	3.0	6.3	2.7	12.2
1940 2/	3.1	3.6	6.7	3/ 2.7	9.3
1941	4/ 2.6	3/ 4.0	3/ 6.6	---	---

1/ Farm-sales-weight equivalent. 2/ Preliminary. 3/ Estimated.
4/ Indicated Sept. 1.

Marketing Quotas to Continue Next Year

It is expected that the Secretary will shortly proclaim marketing quotas for 1942 for fire-cured tobacco and for dark air-cured (types 35 and 36 only). In spite of moderate increases in domestic consumption, the supply situation of these types remains unfavorable, especially in view of the anticipated low level of exports. Suggested 1942 national goals for dark air-cured and fire-cured tobaccos call for reductions of 10 percent, except for certain exemptions for small farms.

In the event that production next year is decreased, 1942 should show a somewhat more satisfactory supply situation from the point of view of more normal marketing relations and prices for future years.

One Sucker Inspection Approved

In a referendum held September 18-20, growers of One Sucker approved the extension this year of the Government inspection (grading) and market news service to the markets for this type. Since all fire-cured markets and those for Green River have already been designated for these Government services, all markets for dark tobaccos will be covered this year with the exception of the small Virginia sun-cured crop. Furthermore, in the event of adoption of the service for all Burley markets, tobacco markets in Kentucky and Tennessee for all types will have the Government inspection and market news services.

CIGAR TOBACCOS, TYPES 41-62

Size of Crop About Same as in 1940: Quality Generally Higher

Estimates of the Crop Reporting Board as of September 1 indicate production of cigar leaf to be 142,196,000 pounds -- only 829,000 pounds less than the crop of 143,025,000 pounds grown in 1940. Generally favorable growing conditions throughout most cigar leaf areas and good early harvesting weather have contributed to a quality of crop somewhat above that of the previous year. A large part of the crop has already been harvested and weather favorable to curing has prevailed. Early indications are that prices for the 1941 crop will be as good for some types and slightly better for other types than those received for the 1940 crop. The value of the crop to growers is likely to be somewhat above the $25,049,000 received for the previous year's crop. Farm stocks of old-crop tobacco are practically cleared out; none remains on farms in the Connecticut Valley.

Acreage (1941) Reduced; Yields of Some Types Higher

Acreages of both the filler and binder classes were reduced by 1.2 percent and 3.6 percent, respectively, in 1941. Wrapper was increased by 700 acres. High yields prevailed in the Connecticut Valley; expected yields in the Wisconsin areas will be somewhat lower; yields in Georgia and Florida were lower than in most years for which records are available. The average yield of 1,373 pounds for all cigar types, however, was practically the same as the yield of 1,361 pounds obtained in 1940.

Shift from Filler to Binder in Georgia and Florida

There has been a gradual shift over a period of years from a sun-grown filler type to a binder type in the Georgia and Florida area, until in 1940 and 1941 none of the filler type was grown. This shift was brought about by the introduction of a new variety of seed producing a thin, silky, tobacco highly suitable for binder purposes. The use of this type was at first purely local but apparently has now spread to other territory. At the present time about the same quantity of this binder type is produced as formerly was produced of filler. As yet no change has been made in designating the type by number in Department releases and publications.

Marketing Agreement for Type 61 Terminated

At the request of the Connecticut Valley Shade Growers' Association, the marketing agreement for Connecticut Valley shade-grown tobacco, type 61, was terminated by the Secretary of Agriculture on August 15, 1941. This agreement, which governed both production and sale of this type during the past 8 years, was said to be outmoded. The agreement has not been replaced.

Stocks of Foreign-Grown Cigar Leaf Above Normal

Stocks of foreign-grown cigar leaf as of July 1, 1941 are the largest on record. The increase results almost entirely from larger holdings of Sumatra and Java wrapper. The increase in Cuban filler is largely offset by the decrease in Philippine filler. Larger Sumatra holdings may be a hedge against possible extension of shipping difficulties and acreage reductions in Sumatra, as well as against further increases in domestic consumption.

Increased Domestic Demand Expected to Continue

During the year ended June 1941, more than 5,708 million cigars were consumed. This is the largest consumption in a decade and resulted from the greatly increased consumer incomes. Percentage increases took place for all classes of cigars, including small cigars, except Class E (retailing at more than 20 cents), where a small decline occurred. In Classes C (8.1 to 15 cents) and Class D (15.1 to 20 cents), increases of 5.6 percent and 8.1 percent respectively occurred.

The Federal Reserve Board index of cigar production reached 113 in June 1941 but declined to 111 in July (1935-39 = 100), reflecting a seasonal decline in production.

Domestic demand for cigars is expected to continue to increase during 1941-42 but at a declining rate. Production of scrap chewing tobacco increased 3.2 percent during the year ended June 1941 compared with the year ended June 1940. Production during June 1941 was 23 percent above June 1940. This is the first time that an increase in production of scrap chewing has taken place in this month since June 1938, when production was larger than in June 1937. Increased production in industry is largely responsible for increased consumption of scrap chewing.

Cigar tobaccos: Domestic supply, disappearance, and season average price, average 1934-38, annual 1938-41 1/

Type and year	Production	Stocks Oct. 1 2/	Total supply	Disappearance year beginning Oct.	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Total filler, types 41-45 -					
Average 1934-38	44.6	159.9	204.5	50.0	10.4
1938	45.6	149.4	195.0	53.1	12.3
1939	62.7	141.9	204.6	53.6	11.7
1940 3/	66.7	151.0	217.7	4/60.7	12.0
1941	5/ 63.2	4/157.0	4/225.2	---	---
Total binder, types 51-55 -					
Average 1934-38	41.4	165.1	206.5	60.0	12.5
1938 6/	53.0	138.0	191.0	74.4	9.6
1939	61.6	116.6	178.2	43.3	16.7
1940 3/	67.0	134.9	201.9	4/63.9	14.8
1941	5/ 63.2	4/138.0	4/201.2	---	---
Total wrapper, types 61-62 -					
Average 1934-38	8.4	10.7	19.1	8.9	78.3
1938 6/	9.0	9.2	18.2	7.4	64.9
1939	11.4	10.8	22.2	9.3	67.7
1940 3/	9.3	12.9	22.2	4/10.2	76.8
1941	5/ 10.8	4/12.0	4/22.8	---	---

1/ Farm-sales-weight equivalent.
2/ Stocks held on farms not included; stocks for types 45 and 62 are as of July 1.
3/ Preliminary.
4/ Estimated.
5/ Indicated Sept. 1.
6/ Production includes loss after harvest as a result of hurricane and flood, estimated as follows: Broadleaf (type 51) 3,820,000 pounds; Havana Seed (type 52) 1,547,000 pounds; and Shade (type 61) 588,000 pounds. These losses are included also in the 1934-38 average.

GENERAL STATISTICAL DATA

Tax-paid withdrawals of tobacco products in the United States, July-June 1939-40, and July-August 1940-41 1/

Products	Year beginning July			July-Aug.		
	1939	1940	Change	1940	1941	Change
	Millions	Millions	Percent	Millions	Millions	Percent
Small cigarettes	177,684	189,747	+ 6.8	31,753	36,181	+ 13.9
Large cigarettes	3	2	2/-34.0	3/	3/	+ 16.3
Large cigars	5,515	5,708	+ 3.5	981	1,020	+ 4.0
Small cigars	130	152	+ 16.9	25	21	- 16.0
Snuff 4/	37,770	38,332	+ 1.5	6,009	6,560	+ 9.2
Manufactured tobacco 4/	302,073	305,083	+ 1.0	52,172	49,736	- 4.7

1/ Tax-paid withdrawals include prodocts from the Philippine Islands and Puerto Rico. 2/ Based on actual, not rounded, figures. 3/ Less than 500,000; percentage change calculated on actual figures. 4/ Thousand pounds.

Production of manufactured tobacco in the United States, July-June 1939-40, and June 1940-41

Manufactured tobacco	Year beginning July			June		
	1939	1940	Change	1940	1941	Change
	1,000 pounds	1,000 pounds	Percent	1,000 pounds	1,000 pounds	Percent
Smoking	201,791	205,264	+ 1.7	16,082	16,288	+ 1.3
Plug	49,951	49,328	- 1.2	4,115	4,229	+ 2.8
Twist	5,640	5,613	- 0.5	416	478	+ 14.9
Fine-cut	4,425	4,973	+ 12.4	367	441	+ 20.2
Scrap chewing	41,979	43,326	+ 3.2	3,187	3,910	+ 22.7

Exports of tobacco from the United States, by types, export weight, 1939 and 1940

Type	10 months beginning Oct.		
	1939	1940	Change
	1,000 pounds	1,000 pounds	Percent
Flue-cured 1/	252,208	135,517	- 46.3
Burley	9,309	4,072	- 56.3
Ky. and Tenn. fire-cured	29,455	10,996	- 62.7
Va. fire-cured	3,670	2,823	- 23.1
Maryland 2/	1,309	1,258	- 3.9
One Sucker	2,098	1,099	- 47.6
Green River	495	408	- 17.6
Cigar leaf	530	1,492	+ 181.5
Black fat, and dark African	4,926	3,202	- 35.0
Perique	45	16	- 64.4
Stems	17,361	12,360	- 28.8
Trimmings and scrap	700	406	- 42.0

1/ 12 months beginning July. The July 1941 exports of flue-cured were 23,469,861 pounds compared with 11,424,779 pounds in July 1940. 2/ 7 months beginning January 1940 and January 1941.

Index numbers of production of tobacco products in the United States, both unadjusted and adjusted for seasonal variation, January 1940-July 1941

(1935-39 = 100)

Year and month	Cigarettes		Cigars		Manufactured tobacco and snuff		Total tobacco products	
	Unadjusted	Adjusted	Unadjusted	Adjusted	Unadjusted	Adjusted	Unadjusted	Adjusted
1940								
Jan.	107	106	86	107	90	93	98	103
Feb.	103	109	90	103	96	97	98	106
Mar.	99	107	92	100	97	95	97	103
Apr.	111	119	97	102	98	99	105	111
May	119	117	102	104	101	100	112	110
June	140	127	104	98	101	99	124	115
July	119	106	105	101	101	99	112	103
Aug.	116	110	108	105	97	96	110	106
Sept.	121	112	117	102	108	100	118	108
Oct.	118	120	127	105	115	112	120	115
Nov.	114	119	123	103	105	106	115	113
Dec.	108	121	83	108	89	101	98	114
Year	115		103		100		109	
1941								
Jan.	119	118	90	111	98	101	108	113
Feb.	118	125	96	110	95	96	108	116
Mar.	119	127	100	109	99	97	110	117
Apr.	118	127	111	117	100	101	113	120
May	133	131	108	109	100	100	121	119
June	144	131	113	106	99	97	128	118
July	138	123	111	106	99	97	123	114
Aug.								

Compiled from monthly Federal Reserve Bulletin.

United States exports, and shipments of tobacco products to noncontiguous territories, 1934-40

Year beginning July	Cigarettes	Cigars and cheroots	Plug	Smoking	Other manufactured
	Millions	Millions	1,000 lb.	1,000 lb.	1,000 lb.
1934	4,619	11	1,787	2,136	220
1935	5,393	14	1,925	2,067	244
1936	6,586	21	2,159	1,901	461
1937	7,405	22	2,228	1,661	866
1938	7,860	18	2,099	1,759	1,008
1939	8,866	19	2,097	1,820	1,247
1940 1/	6,991	7	1,558	918	1,083

Compiled from Monthly Summary of Foreign and Domestic Commerce of the United States, Department of Commerce.

1/ Exports only. Shipments to territories (not available after April 1,1941) for the 9 months July-March are as follows: Cigarettes, 1,429 million; cigars and cheroots, 15 million; plug, 171,000 pounds; smoking, 805,000 pounds; other manufactured, 48,000 pounds.

Acreage and production of tobacco in the United States, by types, 1940 and 1941

Type	Acreage			Production		
	1940 1/	1941 2/	Change	1940 1/	1941 2/	Change
	1,000 acres	1,000 acres	Per-cent	Million pounds	Million pounds	Per-cent
Total flue-cured, types 11-14	736.0	747.7	+1.6	755.8	647.7	-14.3
Old and Middle Belt, type 11	268.0	278.0	+3.7	247.5	230.5	- 6.9
Eastern North Carolina, type 12	245.0	245.0	0.0	274.4	232.8	-15.2
South Carolina, type 13	139.0	141.0	+1.4	146.6	121.5	-17.1
Georgia and Florida, type 14	84.0	83.7	-0.4	87.3	62.9	-27.9
Total fire-cured, types 21-24	117.2	86.1	-26.5	103.5	73.7	-28.8
Virginia, type 21	22.4	16.1	-28.1	18.7	13.3	-28.9
Ky. and Tenn., type 22	65.0	47.5	-26.9	58.5	41.6	-28.9
Ky. and Tenn., type 23	29.3	22.1	-24.6	25.9	18.5	-28.6
Henderson, type 24	.5	.4	3/-11.1	.4	.4	3/-8.6
Burley, type 31	360.5	363.9	+0.9	375.6	328.5	-12.5
Maryland, type 32	38.0	39.1	+2.9	31.9	31.3	-1.9
Total dark air-cured, types 35-37	47.6	36.1	-24.2	42.2	32.6	-22.7
One Sucker, type 35	24.0	18.9	-21.2	21.6	17.4	-19.4
Green River, type 36	20.0	14.0	-30.0	17.5	12.6	-28.0
Va. sun-cured, type 37	3.6	3.2	-11.1	3.1	2.6	-16.1
Total cigar filler, types 41-45	51.0	50.4	-1.2	66.7	68.2	+2.2
Pa. Seedleaf, type 42	33.4	35.7	+6.9	49.1	53.5	+9.0
Miami Valley, types 42-44	16.2	13.8	-14.8	15.9	13.8	-13.2
Ga. and Fla. sun-grown, type 45	1.4	.9	-35.7	1.7	.9	-47.1
Total cigar binder, types 51-55	44.0	42.4	-3.6	67.0	63.2	-5.7
Conn. Valley Broadleaf, type 51	7.7	8.3	+7.8	11.9	14.1	+18.5
Conn. Valley Havanna Seed, type 52	9.4	8.6	-8.5	15.8	14.7	-7.0
N.Y. and Pa. Havanna Seed, type 53	1.7	1.8	+5.9	2.2	2.6	+18.2
Southern Wisconsin, type 54	13.6	11.6	-14.7	20.1	15.4	-23.4
Northern Wisconsin, type 55	11.6	12.1	+4.3	17.0	16.4	-3.5
Total cigar wrapper, types 61-62	10.1	10.8	+6.9	9.3	10.7	+15.1
Conn. Valley Shadegrown, type 61	6.4	6.8	+6.2	5.5	7.1	+29.1
Ga. and Fla. Shadegrown, type 62	3.7	4.0	+8.1	3.8	3.6	-5.3
Total, all types	1,404.4	1,376.5	-2.0	1,452.0	1,255.9	-13.5

1/ Preliminary.
2/ Acreage for harvest, and production indicated Sept. 1. For 1941 acreage allotments by types and States under the Agricultural Conservation Program, see page 26.
3/ Based on actual, not rounded, figures.

State acreage allotments under the 1941 Agricultural Conservation Program[1]

Class of tobacco and State	1941 allotment
	acres
Flue-cured:	
Alabama	500
Florida	13,700
Georgia	73,663
North Carolina	511,224
South Carolina	85,418
Virginia	77,610
Total	*762,115*
Burley:	
Alabama	166
Arkansas	85
Georgia	136
Illinois	37
Indiana	10,751
Kansas	451
Kentucky	264,276
Missouri	5,662
North Carolina	7,948
Ohio	13,662
Oklahoma	8
South Carolina	100
Tennessee	62,836
Virginia	10,535
West Virginia	4,053
Total	*380,706*
Fire-cured:	
Illinois	14
Kentucky	33,151
Missouri	13
Tennessee	35,176
Virginia	15,976
Total	*84,330*
Dark air-cured (One Sucker and Green River):	
Indiana	379
Kentucky	30,777
Missouri	7
Tennessee	4,633
Total	*35,796*
Virginia sun-cured:	
Virginia	3,100
Cigar filler (Pennsylvania Seedleaf, type 41):	
Pennsylvania	30,500
Cigar filler and binder (other than types 41 and 45):	
Connecticut	11,715
Illinois	15
Indiana	17
Massachusetts	5,140
Minnesota	779
New Hampshire	33
New York	1,360
Ohio	17,571
Pennsylvania	423
Vermont	30
Wisconsin	24,905
Total	*61,988*
Cigar wrapper (Georgia and Florida, type 62):	
Florida	2,349
Georgia	551
Total	*2,900*
Total United States	*1,361,435*

Agricultural Adjustment Administration

[1]No State acreage allotments are established for types 45 and 61.

Tobacco: Average yield per acre, by types, in the United States, 1920-41

Year	Flue-cured, types 11-14	Burley, type 31	Maryland type 32	Fire-cured			Dark air-cured				Cigar leaf, types 41-65
				Type 21	Type 22	Type 23	Type 24	Type 35	Type 36	Type 37	
	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.
Av.1920-24	639	824	783	731	781	805	855	826	856	726	1,175
1920	678	789	875	780	766	780	820	819	796	755	1,250
1921	587	754	715	611	795	828	855	843	881	579	1,277
1922	630	857	770	811	763	810	893	859	893	770	1,118
1923	722	872	792	795	785	810	880	827	880	775	1,182
1924	580	849	765	660	798	795	825	782	830	750	1,048
Av.1925-29	698	798	778	761	784	780	783	808	778	784	1,192
1925	689	806	823	751	767	776	775	806	850	795	1,270
1926	699	832	840	793	810	799	896	905	851	802	1,173
1927	750	731	818	800	749	748	646	722	649	821	1,152
1928	660	816	660	703	753	739	750	760	700	692	1,182
1929	691	807	750	760	842	840	850	849	840	810	1,182
Av.1930-34	731	782	677	720	812	759	787	811	824	660	1,189
1930	756	740	560	615	757	700	745	784	785	585	1,170
1931	684	845	730	765	812	804	800	796	880	650	1,228
1932	685	740	775	640	794	779	775	801	825	545	1,139
1933	797	753	600	760	801	657	740	783	740	720	1,120
1934	814	831	720	820	895	856	875	893	890	800	1,289
Av.1935-39	874	838	769	810	806	796	829	834	838	844	1,276
1935	928	792	775	870	821	795	840	835	845	900	1,295
1936	790	727	820	770	805	761	730	730	700	780	1,337
1937	875	907	650	790	846	817	850	908	900	785	1,223
1938	861	833	780	710	709	784	875	785	870	780	1,177
1939	916	930	820	910	851	824	850	911	875	975	1,347
1940 1/	1,027	1,042	840	835	900	884	850	898	875	875	1,361
1941 2/	866	903	800	825	875	836	875	918	900	825	1,373

Compiled, 1920-34, from First Annual Report on Tobacco Statistics, Statistical Bulletin No. 58; 1935-38, Annual Report on Tobacco Statistics, 1940; 1939-41, General Crop Report of the Agricultural Marketing Service, June 1941, and Sept. 1941.

1/ Preliminary.
2/ Indicated Sept. 1.

Stocks of foreign-grown cigar, cigarette and smoking tobacco, by types as reported combining unstemmed and stemmed, owned by dealers and manufacturers in the United States, quarterly, 1938-41

Year and type	Jan. 1	Apr. 1	July 1	Oct. 1
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Total foreign-grown cigar leaf, type 80:				
1938	9,740	9,947	10,235	10,509
1939	10,418	10,571	11,350	12,577
1940	14,637	16,252	17,194	15,942
1941	15,876	17,241	19,850	
Cuba (Havana), type 81:				
1938	6,248	6,266	6,647	6,772
1939	5,987	6,289	6,418	6,633
1940	6,495	6,810	6,942	7,156
1941	7,139	8,140	9,215	
Sumatra and Java, type 82:				
1938	1,671	1,404	1,672	2,077
1939	2,247	1,879	2,494	3,021
1940	2,170	1,720	3,016	2,659
1941	2,435	3,362	5,313	
Philippine Islands (Manila), type 83:				
1938	1,807	2,263	1,898	1,646
1939	2,181	2,245	2,280	2,913
1940	5,969	7,654	7,164	6,054
1941	6,197	5,712	5,199	
Other foreign-grown cigar leaf, type 84:				
1938	14	14	18	14
1939	3	158	158	10
1940	3	68	72	73
1941	105	27	123	
Total foreign-grown cigarette and smoking tobacco, type 90:				
1938	70,366	92,396	82,603	70,228
1939	36,239	108,128	101,530	92,655
1940	116,574	118,528	112,420	106,257
1941	102,733	98,583	108,802	

Compiled from quarterly stocks reports of the Agricultural Marketing Service.

United States imports of tobacco by countries, and shipments from noncontiguous territories, 1934-40 1/

Class and country from which imported	Year beginning July					
	1935	1936	1937	1938	1939	1940 2/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Cigar wrapper:						
Netherlands	1,750	2,695	1,518	796	0	0
Netherlands Indies	1	0	0	1,003	2,059	2,100
Cuba	139	211	183	186	153	105
Other countries	3/	3/	0	0	3/	0
Total	1,890	2,906	1,701	1,985	2,212	2,205
Cigar leaf (filler):						
Unstemmed:						
Cuba	5,234	4,419	3,487	2,250	2,259	2,573
United Kingdom	0	0	0	0	0	0
Other countries	1	1	0	0	3	723
Total	5,235	4,420	3,487	2,250	2,262	3,296
Stemmed:						
Cuba	9,285	6,448	6,598	7,604	8,918	9,754
Puerto Rico	18,616	18,964	16,376	15,530	11,651	15,537
Other countries	0	0	0	0	62	2
Total	27,901	25,412	22,974	23,134	20,631	25,293
Cigarette leaf:						
Greece	19,006	20,233	18,628	18,982	17,297	17,805
Italy	5,985	4,577	753	652	667	772
Turkey in Europe and Asia	15,982	19,799	20,509	27,592	26,144	27,111
Belgium	1,231	635	1,133	228	41	91
Germany 4/	162	300	664	494	3/	0
Egypt	26	16	18	11	4	3/
United Kingdom	191	395	19	16	120	19
Bulgaria	2	301	1,522	2,637	2,367	2,702
Palestine and Syria	312	622	994	1,357	1,453	1,924
Netherlands	391	51	37	9	0	0
Malta, Gozo, and Cyprus	230	57	10	0	0	0
Other countries	20	49	540	805	1,827	1,580
Total	43,538	47,035	44,827	52,783	49,920	52,004
Stems, scrap and trimmings:						
Cuba	3,423	2,465	2,836	3,019	3,284	3,289
United Kingdom	1,767	1,818	1,628	1,532	1,145	301
Philippine Islands	2,370	3,423	5,395	5,093	11,596	6,590
Puerto Rico	4,541	4,616	4,323	7,678	4,536	4,580
Other countries	387	794	1,549	1,819	1,332	402
Total	12,488	13,116	15,731	19,141	21,893	15,162

Compiled from official records of the Bureau of Foreign and Domestic Commerce.

1/ Imports for consumption.
2/ Preliminary.
3/ Less than 500 pounds.
4/ Beginning May 6, 1938, the United States trade with Germany includes Austria; for comparable figures in earlier years add Austria and Germany.

United States imports of tobacco products by countries, and shipments from noncontiguous territories, 1934-40 1/

Product and country	Year beginning July					
	1935	1936	1937	1938	1939	1940 2/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Cigars and cheroots:						
Cuba	64	47	42	37	49	53
Belgium	3/	0	3/	3/	3/	0
Germany 4/	3/	3/	0	0	0	0
United Kingdom	3/	3/	3/	3/	3/	0
Philippine Islands	3,767	3,377	3,546	3,336	3,946	3,327
Puerto Rico 5/ 6/	959	906	216	25	24	20
Other countries	3/	3/	3/	1	1	1
Total	4,790	4,330	3,804	3,399	4,020	3,401
Cigarettes:						
United Kingdom	2	2	1	2	2	2
Egypt	1	1	1	3/	1	3/
Philippine Islands	66	4	2	3	2	1
Puerto Rico 5/ 7/	8	11	13	13	10	8
Other countries	3/	3/	1	3	2	2
Total	77	18	18	21	17	13
All other tobacco products: 8/						
Hong Kong	60	44	30	16	10	14
United Kingdom	43	49	40	56	59	50
Italy	32	21	25	19	16	0
Canada	3	4	3	3	2	3
Cuba	1	1	3/	3/	3/	3/
Egypt	0	0	0	0	0	0
China	5	5	18	48	31	30
Azores	1	2	1	1	1	1
Ireland	3/	0	3/	3/	3/	3/
Puerto Rico 5/	2	6	2	2	2	4
Other countries	1	3/	4	1	2	1
Total	148	132	123	146	123	103

Compiled from Monthly Summary of Foreign Commerce of the United States and official records of the Bureau of Foreign and Domestic Commerce.

1/ Imports for consumption.
2/ Preliminary.
3/ Less than 500 pounds.
4/ Beginning May 6, 1938, the United States trade with Germany includes Austria; for comparable figures in earlier years add Austria and Germany.
5/ No shipments reported from Alaska, Hawaii, and the Virgin Islands.
6/ Conversion to pounds made on basis of 18 pounds per 1,000 cigars.
7/ Conversion to pounds made on basis of 2.25 pounds per 1,000 cigarettes.
8/ Includes snuff and snuff flour; stems cut, ground, or pulverized and manufactures of tobacco not specially provided for.

TOBACCO: EXPORTS FROM THE UNITED STATES, 1899-1940*

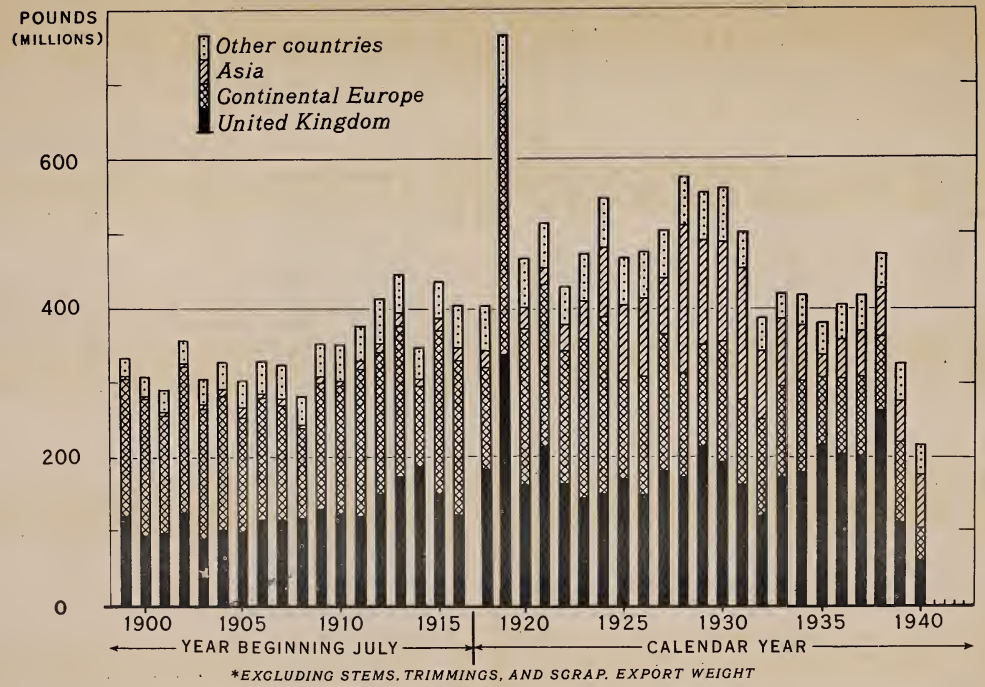

FIGURE 1.- EXPORTS OF TOBACCO TO ASIA AND CONTINENTAL EUROPE SHOW IMPORTANT DECREASES IN RECENT YEARS WHEREAS EXPORTS TO THE UNITED KINGDOM REMAINED AT A RELATIVELY HIGH LEVEL UNTIL THE OUTBREAK OF THE PRESENT EUROPEAN WAR. TOTAL EXPORTS IN 1940 WERE THE SMALLEST FOR THE PERIOD COVERED BY THE CHART.

Tobacco: Exports from the United States, by countries, 1899-1940 1/
(Data for neg. 24039)

Year beginning July	United Kingdom	Continental Europe	Asia	Other countries	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1899	121.8	184.0	3.6	25.2	334.6
1900	93.0	185.7	2.5	25.7	306.9
1901	98.7	158.5	5.1	29.1	291.4
1902	125.1	197.0	4.5	30.9	357.5
1903	89.4	176.2	5.4	34.4	305.4
1904	101.8	179.5	9.8	37.1	328.2
1905	98.0	153.0	14.4	36.9	302.3
1906	116.4	165.2	5.6	44.3	331.5
1907	116.1	153.9	8.5	44.5	323.0
1908	118.6	121.6	5.0	37.5	282.7
1909	131.0	170.0	8.6	43.8	353.4
1910	122.5	174.6	6.5	48.0	351.6
1911	120.8	198.0	10.2	46.4	375.4
1912	150.1	191.2	12.8	60.1	414.2
1913	174.8	202.9	17.1	52.1	446.9
1914	189.3	107.3	9.4	42.0	348.0
1915	150.6	219.4	16.6	49.9	436.5
1916	122.6	208.8	16.8	58.2	406.4
Calendar year	United Kingdom	Continental Europe	Asia	Other countries	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1918	183.5	136.8	24.0	59.6	403.9
1919	338.8	333.8	24.0	69.3	765.9
1920	162.7	209.1	29.4	66.5	467.7
1921	214.9	213.6	22.8	59.1	515.4
1922	165.2	178.2	36.6	50.9	430.9
1923	146.4	213.0	51.8	63.3	474.5
1924	151.0	237.2	92.7	65.7	546.6
1925	171.1	132.9	101.1	63.4	468.5
1926	149.7	160.1	104.2	64.8	478.8
1927	182.6	183.7	76.0	64.0	506.3
1928	173.7	140.3	196.8	64.6	575.4
1929	214.6	136.9	138.6	65.2	555.3
1930	193.8	162.4	132.5	72.3	561.0
1931	162.9	116.3	175.4	48.9	503.5
1932	121.6	130.9	91.6	43.7	387.8
1933	172.9	124.2	89.0	34.3	420.4
1934	180.0	123.1	74.2	41.7	419.0
1935	216.2	91.5	31.1	42.4	381.2
1936	206.5	100.2	52.4	47.7	406.8
1937	203.3	107.6	60.4	46.5	417.8
1938	262.3	101.5	64.0	45.1	472.9
1939	112.9	103.2	56.1	50.0	327.2
1940	59.0	46.6	72.6	38.9	217.1
1941					

Compiled from Foreign Commerce and Navigation of the United States and official records of the Bureau of Foreign and Domestic Commerce, Department of Commerce.
1/ Excluding stems, trimmings, and scrap. Export weight.

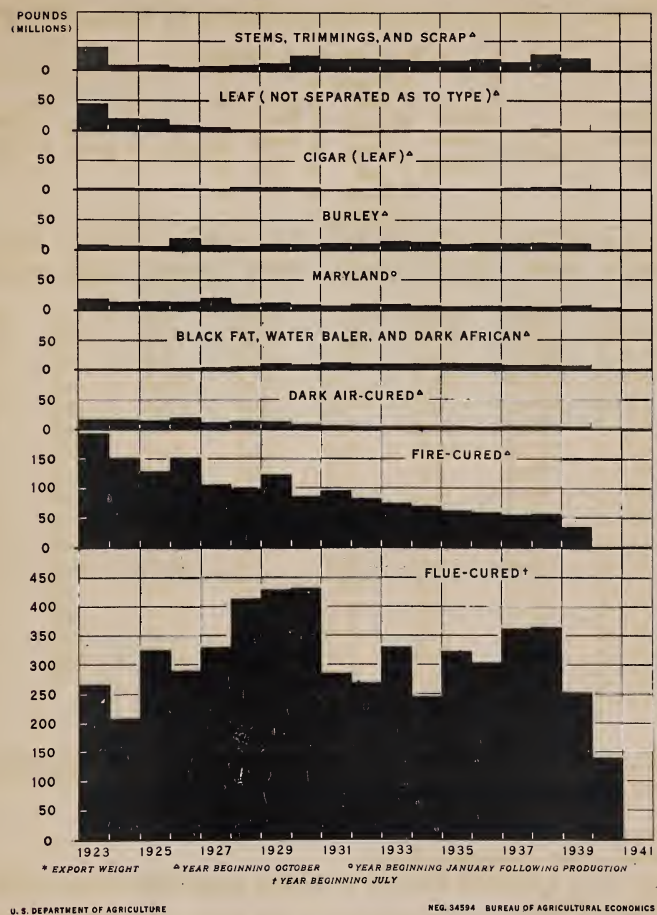

FIGURE 2.- THE IMPORTANT UNITED STATES EXPORT TOBACCOS ARE FLUE-CURED AND FIRE-CURED. EXPORTS OF FIRE-CURED AND DARK AIR-CURED TOBACCOS HAVE BEEN CURTAILED BY DECREASED TOTAL CONSUMPTION OF THESE KINDS IN FOREIGN COUNTRIES, BY INCREASED FOREIGN PRODUCTION, BY THE OPERATION OF TRADE BARRIERS, AND MORE RECENTLY BY THE WAR. WHILE INCREASED PRODUCTION AND UNSETTLED WORLD CONDITIONS HAVE AFFECTED FOREIGN MARKETS FOR UNITED STATES FLUE-CURED LEAF, THE INCREASING TOTAL FOREIGN CONSUMPTION OF THIS KIND OF TOBACCO IN THE FORM OF CIGARETTES, PARTICULARLY IN THE UNITED KINGDOM, MAINTAINED FLUE-CURED EXPORTS AT A HIGH LEVEL UNTIL THE OUTBREAK OF THE PRESENT EUROPEAN WAR.

Tobacco: Exports from the United States, by types, 1923-40 1/

(Data for neg. 34594)

Year beginning Oct.	Flue-cured 2/	Fire-cured	Dark air-cured	Black Fat, Water Baler, and Dark African	Maryland 3/	Burley	Cigar leaf	Other leaf 4/	Stems, trimmings and scrap
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1923	266.0	194.5	16.2	5/	18.1	7.7	1.5	44.9	39.2
1924	207.5	151.0	16.8	5/	12.8	6.0	.7	20.8	8.6
1925	324.4	129.3	14.4	5/	13.9	5.8	.7	19.4	9.4
1926	288.7	150.4	19.8	.4	13.6	18.1	.6	9.7	5.9
1927	328.9	105.9	11.5	1.2	20.0	7.1	.6	5.9	7.4
1928	413.9	98.5	12.9	4.5	10.9	6.2	4.4	1.7	9.3
1929	429.9	122.6	12.1	8.2	11.6	9.7	4.3	.2	12.4
1930	432.7	85.9	7.2	7.6	9.7	8.7	3.7	.1	26.1
1931	285.5	95.8	5.3	10.4	7.5	11.0	.8	.1	20.9
1932	269.7	82.2	3.4	8.4	10.2	10.4	1.3	6/	20.9
1933	330.3	75.0	3.4	8.3	9.2	13.9	1.5	.1	18.6
1934	244.5	70.6	4.5	9.7	7.1	12.0	1.2	.1	16.2
1935	322.8	62.8	4.5	10.1	4.7	8.9	.7	.1	17.5
1936	302.6	59.9	2.6	9.5	6.1	11.2	.7	.1	20.5
1937	361.9	54.7	3.9	7.8	5.3	11.1	1.3	.1	14.8
1938	362.5	56.5	4.0	7.8	4.5	11.3	3.0	.2	28.4
1939	252.2	34.0	2.7	5.5	6.3	10.1	.6	.1	20.9
1940	135.5				2.3				

Compiled from official records of the Bureau of Foreign and Domestic Commerce, Department of Commerce.

1/ Export weight.
2/ Flue-cured, year beginning July.
3/ Maryland, year beginning January following production (i.e., 1923 data are exports of 1922 crop).
4/ October 1923-December 1928 includes a part of export of other types not reported separately; beginning January 1929, Perique only.
5/ Prior to January 1, 1927, included with other leaf.
6/ Less than 50,000 pounds.

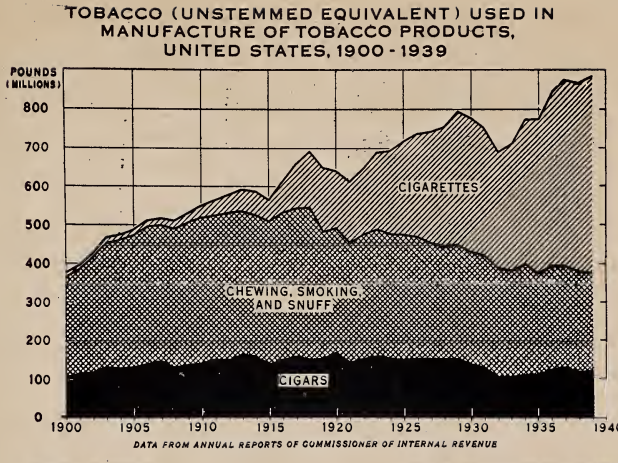

FIGURE 3.- CIGARETTE MANUFACTURE IN THE LAST TWO DECADES HAS BEEN THE LARGEST FACTOR IN THE EXPANSION OF THE TOBACCO INDUSTRY. LEAF USED IN CIGAR MANUFACTURE HAS REMAINED FAIRLY STABLE, WHEREAS LEAF USED IN THE MANUFACTURE OF OTHER TOBACCO PRODUCTS HAS DECLINED SINCE THE FIRST WORLD WAR.

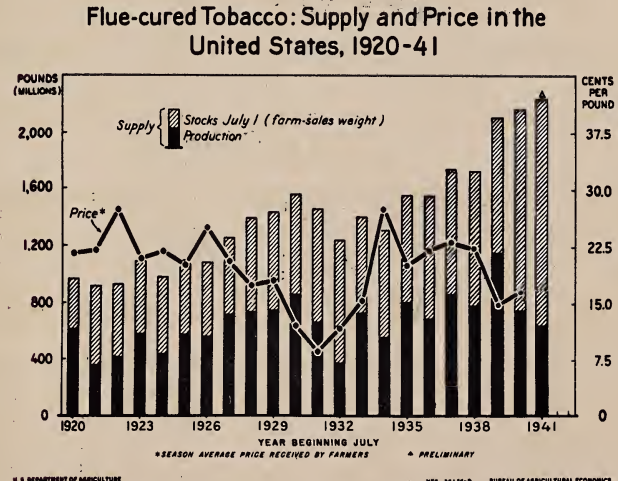

FIGURE 4.- NORMALLY A CHANGE IN THE SUPPLY OF FLUE-CURED TOBACCO RESULTS IN A PRICE CHANGE IN THE OPPOSITE DIRECTION, BUT IN SOME YEARS THE EFFECTS OF SUPPLY CHANGES ARE OFFSET BY CHANGES IN GENERAL ECONOMIC CONDITIONS OR BY OTHER FACTORS. IN 1933, FOR EXAMPLE, NOTWITHSTANDING A MATERIALLY LARGER SUPPLY, THE PRICE INCREASED SUBSTANTIALLY, AND IN 1934 THE INCREASE IN PRICE WAS OUT OF PROPORTION TO THE MODERATE DECREASE IN SUPPLY. THE RECORD 1939 SUPPLY, TOGETHER WITH REDUCED EXPORT OUTLETS, RESULTED IN A PRICE OF 14.9 CENTS PER POUND. IN 1940 SUPPLIES WERE SLIGHTLY LARGER, BUT A HIGHER PRICE (16.4 CENTS) WAS ACHIEVED WITH THE AID OF COMMODITY CREDIT CORPORATION PROGRAMS. THE 1941 CROP IS THE SMALLEST SINCE 1934.

Tobacco: Unstemmed equivalent of all kinds of leaf used in manufacture of tobacco products in the United States, 1900-1939
(Data for neg. 32738)

Calendar year	Cigarettes	Tobacco: and snuff	Cigars	Total	Calendar year	Cigarettes	Tobacco: and snuff	Cigars	Total
	Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.		Mil.lb.	Mil.lb.	Mil.lb.	Mil.lb.
1900	13.1	262.4	105.4	380.9	1920	146.9	324.5	168.6	640.0
1901	11.1	270.7	116.4	398.2	1921	158.3	310.7	143.2	612.2
1902	11.8	299.2	117.4	428.4	1922	169.6	325.5	151.7	646.8
1903	12.5	325.5	130.1	468.1	1923	200.4	328.9	159.7	689.0
1904	13.3	334.7	127.7	475.7	1924	217.7	322.8	153.4	693.9
1905	13.4	343.0	130.6	487.0	1925	244.3	325.1	149.0	718.4
1906	16.1	356.3	140.3	512.7	1926	267.6	317.4	152.4	737.4
1907	18.6	351.0	147.5	517.1	1927	290.5	301.3	152.5	744.3
1908	20.7	359.3	130.4	510.4	1928	310.1	293.2	151.3	754.6
1909	23.7	369.6	136.7	530.0	1929	346.5	298.0	152.1	796.6
1910	31.3	378.4	141.1	550.8	1930	347.9	294.0	137.9	779.8
1911	38.6	376.2	149.9	564.7	1931	330.0	294.8	127.6	752.4
1912	47.1	382.0	149.7	578.8	1932	299.0	286.8	104.3	690.1
1913	56.5	373.7	163.0	593.2	1933	326.1	279.9	104.7	710.7
1914	62.2	368.3	158.7	589.2	1934	375.4	289.0	111.1	775.5
1915	56.5	370.8	138.1	565.4	1935	399.5	262.7	113.7	775.9
1916	78.5	384.9	148.9	612.3	1936	453.3	267.5	126.6	847.4
1917	113.3	388.6	157.7	659.6	1937	480.0	264.3	128.6	872.9
1918	146.1	396.1	149.8	692.0	1938	483.8	262.7	118.8	865.3
1919	166.8	370.1	151.5	648.4	1939	509.1	253.5	122.7	885.3

Compiled from annual reports of the Commissioner of Internal Revenue, Treasury Department.

Flue-cured tobacco: Production, stocks, supply, and price, United States, 1920-41
(Data for neg. 26476-B)

Year beginning July	Production	Stocks July 1 (farm-sales weight)	Supply	Season average farm price per pound	Year beginning July	Production	Stocks July 1 (farm sales weight)	Supply	Season average farm price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Ct.		Mil.lb.	Mil.lb.	Mil.lb.	Ct.
1920	616.0	352.5	968.5	21.5	1931	669.5	794.5	1,464.0	8.4
1921	358.8	557.8	916.6	21.9	1932	373.7	867.0	1,240.7	11.6
1922	415.4	513.3	928.7	27.2	1933	733.4	675.8	1,409.2	15.3
1923	580.7	507.7	1,088.4	20.8	1934	556.8	763.0	1,319.8	27.3
1924	437.3	545.6	982.9	21.6	1935	811.2	752.6	1,563.8	20.0
1925	575.1	526.4	1,101.5	20.0	1936	682.8	871.3	1,554.1	22.2
1926	560.1	523.7	1,083.8	24.9	1937	866.3	883.2	1,749.5	23.0
1927	718.8	538.9	1,257.7	20.5	1938	785.7	954.5	1,740.2	22.2
1928	739.1	657.9	1,397.0	17.3	1939	1,168.8	946.3	2,115.1	14.9
1929	750.0	688.8	1,438.8	18.0	1940	755.8	1,409.7	2,165.5	16.4
1930	865.2	703.4	1,568.6	12.0	1941 1/	647.7	1,592.9	2,240.6	

Compiled from data of the Agricultural Marketing Service. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.
1/ Preliminary; September 1 estimate of production.

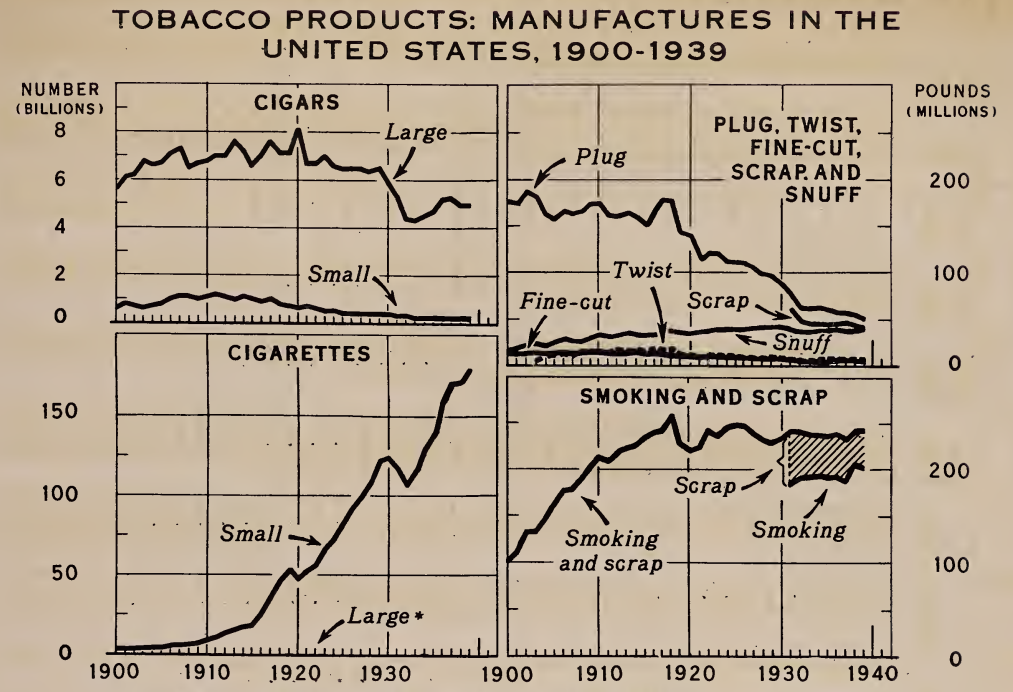

FIGURE 5.- TRENDS IN CONSUMPTION SINCE 1900 ARE INDICATED BY THE TRENDS IN PRODUCTION. THE UPWARD TREND IN CIGARETTE MANUFACTURE AND THE DOWNWARD TREND IN PLUG CHEWING TOBACCO ARE MOST NOTICEABLE.

Tobacco products: Manufactures in the United States, 1900-39

(Data for neg. 32741)

Calendar year	Cigars		Cigarettes		Chewing				Smoking	Snuff	Total chewing, smoking and snuff
	Large	Small	Large	Small	Plug	Twist 1/	Fine-cut	Scrap 2/			
	Bil.	Bil.	Mil.	Bil.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1900	5.6	.6	4.6	3.3	173.9	---	11.5	---	101.5	13.8	300.7
1901	6.1	.8	5.2	2.7	172.5	---	11.7	---	112.2	17.5	313.9
1902	6.2	.7	10.1	3.0	185.7	---	12.1	---	131.1	18.7	347.6
1903	6.8	.6	6.4	3.4	180.2	2.3	11.9	---	134.4	22.7	351.5
1904	6.6	.7	7.1	3.4	163.4	8.8	12.1	---	149.2	20.2	353.7
1905	6.7	.8	6.9	3.7	156.8	10.1	11.7	---	165.2	23.7	367.5
1906	7.1	1.0	10.7	4.5	165.1	11.7	12.7	---	175.7	26.1	391.3
1907	7.3	1.1	15.0	5.3	159.7	12.2	12.5	---	179.2	24.2	387.8
1908	6.5	1.1	17.7	5.7	164.7	14.5	12.1	---	192.2	24.0	407.5
1909	6.7	1.0	17.8	6.8	173.4	14.6	12.5	---	202.4	28.5	431.4
1910	6.8	1.1	19.4	8.6	174.3	14.6	12.9	---	214.1	31.4	447.3
1911	7.0	1.2	17.1	10.5	160.9	13.9	11.0	---	209.4	28.9	424.1
1912	7.0	1.1	16.6	13.2	160.2	15.5	11.0	---	217.3	31.4	435.5
1913	7.6	1.0	15.1	15.6	164.4	14.9	10.9	---	220.8	32.9	443.9
1914	7.2	1.1	13.9	16.9	156.5	16.0	10.9	---	226.9	30.6	440.9
1915	6.6	1.0	15.8	18.0	150.7	14.8	10.1	---	234.9	31.9	442.4
1916	7.0	.9	22.2	25.3	165.6	16.0	10.9	---	239.7	34.0	466.2
1917	7.6	1.0	24.6	35.3	179.4	15.2	11.3	---	243.6	33.5	483.0
1918	7.1	.8	23.4	46.7	174.7	17.5	9.8	---	257.9	37.2	497.1
1919	7.1	.7	31.9	53.1	141.0	11.3	8.2	---	228.6	35.0	424.1
1920	8.1	.6	28.0	47.4	138.5	11.8	8.7	---	219.3	34.3	412.6
1921	6.7	.7	14.5	52.1	113.4	9.3	6.9	---	222.7	34.7	387.0
1922	6.7	.6	17.4	55.8	120.2	10.9	6.9	---	243.4	38.1	419.5
1923	7.0	.5	18.1	66.7	120.8	10.7	7.1	---	235.0	39.2	412.8
1924	6.6	.5	16.1	72.7	111.5	9.9	6.8	---	247.0	39.0	414.2
1925	6.5	.4	17.4	82.2	111.4	9.8	7.2	---	247.7	37.8	413.9
1926	6.5	.4	13.2	92.1	109.8	9.2	7.0	---	246.4	38.2	410.6
1927	6.5	.4	11.4	99.8	103.9	8.0	6.3	---	237.9	40.2	396.3
1928	6.4	.4	10.4	108.7	100.6	8.9	5.2	---	231.1	40.5	386.3
1929	6.5	.4	10.0	122.4	96.7	8.2	5.6	---	229.6	41.1	381.2
1930	5.9	.4	7.4	123.8	86.3	7.6	5.1	---	232.0	40.8	371.8
1931	5.3	.3	5.2	117.1	76.7	6.4	4.2	61.2	182.9	39.8	371.2
1932	4.4	.3	3.4	106.6	61.9	4.9	3.3	50.1	191.1	36.0	347.3
1933	4.3	.2	2.8	114.9	61.4	5.0	3.1	44.7	191.8	36.1	342.1
1934	4.5	.2	88.2	130.0	62.7	5.1	3.0	44.8	193.1	36.9	345.6
1935	4.7	.2	2.5	140.0	60.6	5.5	4.7	44.0	191.7	36.1	342.7
1936	5.2	.2	2.5	158.9	59.2	6.4	5.1	45.3	194.0	38.0	348.0
1937	5.3	.2	3.1	170.0	58.3	6.8	5.0	45.6	187.8	37.1	340.6
1938	5.0	.2	2.6	171.7	54.5	5.6	4.6	42.8	200.7	37.2	345.4
1939	5.2	.2	4.4	180.7	51.3	5.7	4.7	41.3	202.3	38.0	343.3

Compiled from annual reports of the Commissioner of Internal Revenue, Treasury Department.

1/ Prior to 1903, included in plug tobacco.

2/ Prior to 1931, included in smoking tobacco.

Burley Tobacco: Supply and Price in the United States, 1920-41

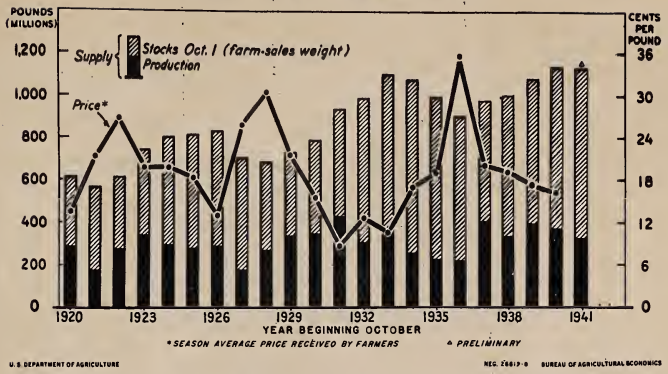

FIGURE 6.- THERE IS A CLOSE RELATIONSHIP BETWEEN THE TOTAL SUPPLY AND PRICE OF BURLEY TOBACCO, WHICH IS ALMOST ENTIRELY CONSUMED IN THE UNITED STATES. THE VARIATIONS WHICH OCCUR IN STOCKS RESULT MAINLY FROM CHANGES IN THE PRODUCTION OF THE PRECEDING YEARS, SINCE DISAPPEARANCE IS FAIRLY STABLE. THE INCREASED USE OF BURLEY TOBACCO IN CIGARETTES HAS BEEN PARTIALLY OFFSET BY DECREASES IN PRODUCTION OF CHEWING TOBACCO. THE LARGE 1939 SUPPLY, ALTHOUGH NOT A RECORD SUPPLY, RESULTED IN A SEASON AVERAGE PRICE OF 17.3 CENTS PER POUND. THE 1940 CROP, OF RELATIVELY POOR QUALITY, WAS LARGER THAN ORIGINALLY ANTICIPATED. SUPPLIES WERE LARGER THAN A YEAR EARLIER, AND PRICES DECLINED TO 16.2 CENTS PER POUND IN SPITE OF COMMODITY CREDIT CORPORATION LOANS LATE IN THE SEASON.

Maryland Tobacco: Supply and Price in the United States, 1920-41

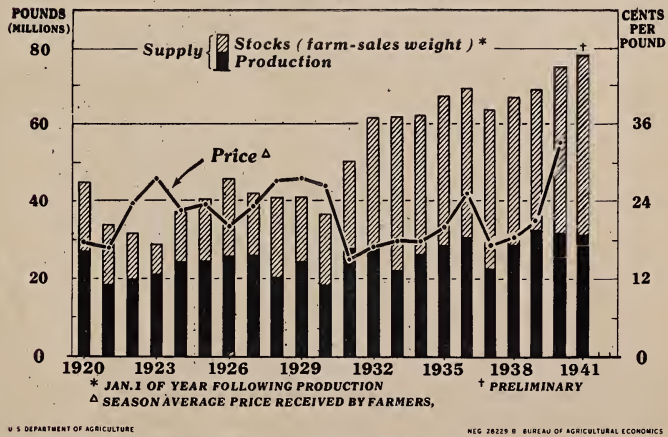

FIGURE 7.- MATERIAL CHANGES HAVE OCCURRED IN THE SITUATION OF MARYLAND TOBACCO AS A RESULT OF DECREASES IN EXPORTS AND A LARGER INCREASE IN DOMESTIC DEMAND. THERE HAVE BEEN NO SIGNIFICANT CHANGES IN PRODUCTION. INCREASED CONSUMPTION OF CIGARETTES HAS CONTRIBUTED TO THE RECENT IMPROVEMENT IN MARYLAND PRICES.

Burley tobacco: Production, stocks, supply, and price, United States, 1920-41
(Data for neg. 28619-B)

Year beginning October	Production	Stocks Oct. 1, (farm-sales weight)	Supply	Season average farm price per pound	Year beginning October	Production	Stocks Oct. 1, (farm-sales weight)	Supply	Season average farm price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Cents		Mil.lb.	Mil.lb.	Mil.lb.	Cents
1920	287.7	323.5	611.2	13.5	1931	424.8	510.2	935.0	8.7
1921	175.7	386.7	562.4	21.5	1932	303.7	682.6	986.3	12.5
1922	276.4	333.2	609.6	26.8	1933	377.5	720.3	1,097.8	10.5
1923	340.4	399.9	740.3	20.0	1934	252.2	820.3	1,072.5	16.9
1924	295.8	505.4	801.2	20.1	1935	220.9	769.9	990.8	19.1
1925	277.8	534.8	812.6	18.0	1936	219.6	681.7	901.3	35.7
1926	288.8	541.2	830.0	13.1	1937	402.4	571.8	974.2	20.1
1927	176.2	525.8	702.0	25.9	1938	339.4	660.7	1,000.1	19.0
1928	269.1	413.3	682.4	30.5	1939	396.3	684.1	1,080.4	17.3
1929	337.4	394.2	731.6	21.8	1940	375.5	762.3	1,137.8	16.2
1930	349.2	438.3	787.5	15.5	1941 1/	327.5	805.0	1,133.5	

Compiled from data of the Agricultural Marketing Service. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.
1/ Sept. 1 estimates.

Maryland tobacco: Production, stocks, supply, and price, United States, 1920-41
(Data for neg. 28229-B)

Calendar year	Production	Stocks Jan. 1 (farm-sales weight) 1/	Supply	Season average farm price per pound	Calendar year	Production	Stocks Jan. 1 (farm-sales weight) 1/	Supply	Season average farm price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Cents		Mil.lb.	Mil.lb.	Mil.lb.	Cents
1920	27.1	17.2	44.3	17.8	1931	28.1	21.8	49.9	15.0
1921	18.6	14.7	33.3	16.9	1932	28.7	32.3	61.0	16.8
1922	20.0	11.4	31.4	23.8	1933	22.2	38.9	61.1	17.8
1923	21.4	7.2	28.6	27.7	1934	26.2	36.0	62.2	17.5
1924	24.5	12.3	36.8	22.7	1935	28.7	38.6	67.3	20.0
1925	24.7	15.6	40.3	23.7	1936	30.8	38.5	69.3	25.4
1926	26.0	19.3	45.3	20.2	1937	22.8	41.1	63.9	17.2
1927	26.2	15.8	42.0	23.4	1938	29.2	37.7	66.9	18.5
1928	20.5	20.9	41.4	27.2	1939	32.8	36.3	69.1	21.1
1929	24.8	16.0	40.8	27.7	1940	31.9	43.2	75.1	2/33.3
1930	19.6	17.7	37.3	26.6	1941 3/	31.3	47.0	78.3	

Compiled from data of the Agricultural Marketing Service. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.
1/ Stocks as of Jan. 1 of year following production.
2/ Indicated by sales data.
3/ Sept. 1 estimates.

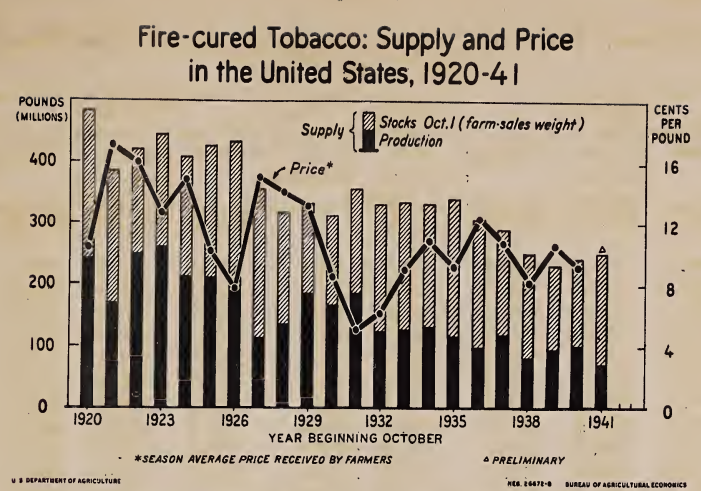

FIGURE 8.- DOMESTIC CONSUMPTION OF FIRE-CURED TOBACCO IS MOSTLY IN THE MANUFACTURE OF SNUFF. EXPORTS HAVE BEEN ON A DECLINING BASIS FOR MANY YEARS. EXPORTS, AND THEREFORE DISAPPEARANCE, WERE REDUCED GREATLY DURING 1939-41 BECAUSE OF THE EUROPEAN WAR. DURING THE PERIOD 1935-38, AS A RESULT OF THE BYPRODUCTS DIVERSION PROGRAM, PRICES AND DISAPPEARANCE WERE HIGHER THAN WOULD OTHERWISE HAVE BEEN THE CASE.

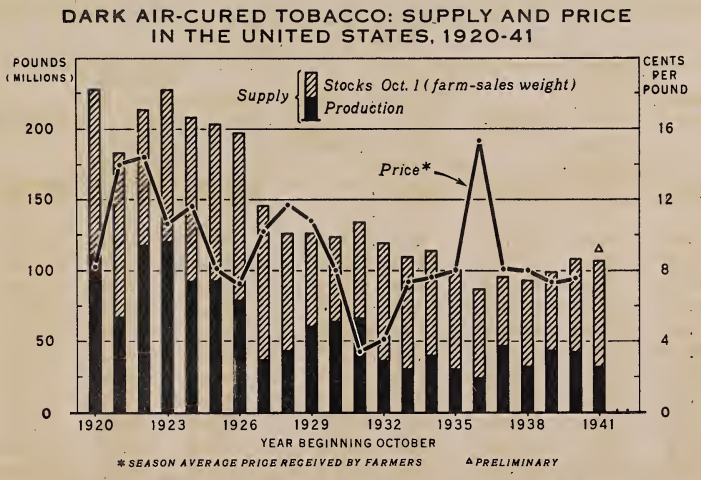

FIGURE 9.- THIS CHART SHOWS ALL DARK AIR-CURED TYPES COMBINED. THE PRODUCTION OF DARK AIR-CURED TOBACCO HAS BEEN DECLINING FOR MANY YEARS LARGELY BECAUSE OF THE DECLINE IN THE CONSUMPTION OF CHEWING TOBACCO. A SUBSTANTIAL AMOUNT OF ONE SUCKER IS USED IN BLACK FAT, WATER BALER, AND DARK AFRICAN FOR EXPORT PRINCIPALLY TO WEST AFRICA. THE UNITED KINGDOM AND BELGIUM HAVE BEEN THE MAIN EXPORT OUTLETS FOR GREEN RIVER. VIRGINIA SUN-CURED IS NOT AN EXPORT TYPE.

Fire-cured tobacco: Production, stocks, supply, and price, United States, 1920-41
(Data for neg. 26672-B)

Year beginning October	Production	Stocks Oct. 1, (farm-sales weight)	Supply	Season average farm price per pound	Year beginning October	Production	Stocks Oct. 1, (farm-sales weight)	Supply	Season average farm price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Cents		Mil.lb.	Mil.lb.	Mil.lb.	Cents
1920	240.7	241.4	482.1	10.4	1931	186.8	173.0	359.8	5.1
1921	170.4	214.0	384.4	17.2	1932	124.2	208.1	332.3	6.2
1922	250.1	170.0	420.1	16.0	1933	128.4	208.7	337.1	9.1
1923	261.4	182.6	444.0	12.7	1934	132.9	200.0	332.9	10.8
1924	213.9	194.7	408.6	14.9	1935	117.4	223.9	341.3	9.2
1925	210.8	215.5	426.3	10.2	1936	99.7	208.0	307.7	12.3
1926	188.8	244.3	433.1	7.8	1937	119.0	170.7	289.7	10.7
1927	113.5	244.1	357.6	15.1	1938	81.0	168.3	249.3	8.2
1928	136.5	182.7	319.2	14.2	1939	97.2	136.2	233.4	10.5
1929	186.9	146.4	333.3	13.3	1940	103.5	141.6	245.1	9.3
1930	168.5	145.6	314.1	8.5	1941 1/	73.7	179.0	252.7	

Compiled from data of the Agricultural Marketing Service. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.
1/ September 1 estimates.

Dark air-cured tobacco: Production, stocks, supply and price, United States, 1920-41
(Data for neg. 38650)

Year beginning October	Production	Stocks Oct. 1, (farm-sales weight)	Supply	Season average farm price per pound	Year beginning October	Production	Stocks Oct. 1, (farm-sales weight)	Supply	Season average farm price per pound
	Mil.lb.	Mil.lb.	Mil.lb.	Cents		Mil.lb.	Mil.lb.	Mil.lb.	Cents
1920	110.2	118.0	228.2	8.2	1931	66.2	67.5	133.7	3.4
1921	66.9	116.9	183.8	14.0	1932	36.5	82.5	119.0	4.1
1922	117.5	95.9	213.4	14.4	1933	31.0	78.8	109.8	7.3
1923	120.3	107.7	228.0	10.6	1934	40.4	73.3	113.7	7.6
1924	92.2	116.4	208.6	11.6	1935	31.0	69.7	100.7	8.0
1925	92.3	111.4	203.7	8.1	1936	24.6	62.2	86.8	15.3
1926	78.4	119.9	198.3	7.2	1937	47.4	48.2	95.6	8.1
1927	36.7	108.9	145.6	10.2	1938	32.8	60.4	93.2	8.0
1928	43.9	82.1	126.0	11.7	1939	43.6	56.1	99.7	7.3
1929	60.3	65.4	125.7	10.8	1940	42.2	65.6	107.8	7.7
1930	63.7	59.8	123.5	8.0	1941 1/	32.6	75.0	107.6	

Compiled from data of the Agricultural Marketing Service. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.
1/ September 1 estimates.

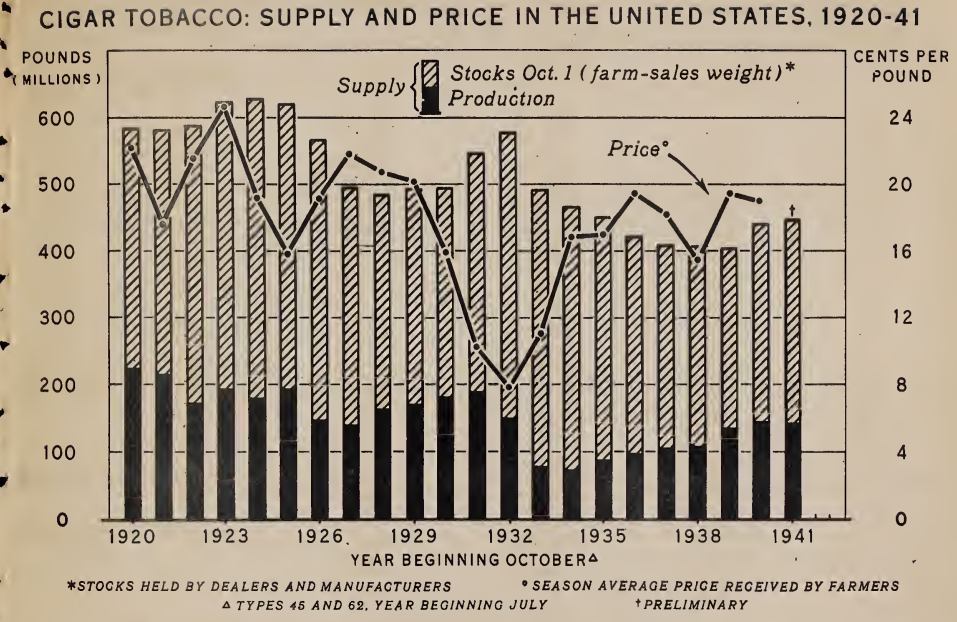

FIGURE 10.- PRODUCTION OF CIGAR TOBACCO WAS UNDULY LARGE FROM 1930 TO 1932 WHEN CIGAR CONSUMPTION WAS DECLINING SHARPLY. REDUCED PRODUCTION OF CIGAR TOBACCO, COUPLED WITH INCREASING CIGAR CONSUMPTION, SINCE 1933 HAS ESTABLISHED A BETTER BALANCE IN THE SUPPLY SITUATION AND IMPROVED PRICES HAVE RESULTED. FARM STOCKS, NOT SHOWN IN THIS CHART, HAVE DECLINED MATERIALLY SINCE 1933. THE HIGHER LEVEL OF SUPPLIES IN 1940 AND 1941 WAS NOT OUT OF LINE, IN VIEW OF THE INCREASED CONSUMPTION RESULTING FROM LARGER CONSUMER INCOMES.

Cigar tobacco: Production, stocks, supply, and price, United States, 1920-41
(Data for neg. 26055)

Year beginning October	Production	Stocks Oct. 1 (farm-sales weight) 1/	Supply	Season average farm price per pound
	Million pounds	Million pounds	Million pounds	Cents
1920	223.6	360.9	584.5	22.2
1921	212.9	369.2	582.1	17.6
1922	172.6	415.7	588.3	21.5
1923	192.2	430.5	622.7	24.6
1924	180.1	448.0	628.1	19.2
1925	194.4	425.8	620.2	15.8
1926	146.5	420.3	566.8	19.1
1927	139.0	356.2	495.2	21.8
1928	162.9	322.9	485.8	20.7
1929	170.9	322.2	493.1	20.1
1930	181.0	313.7	494.7	15.9
1931	187.9	358.0	545.9	10.2
1932	150.1	427.4	577.5	7.8
1933	78.4	413.7	492.1	11.0
1934	73.2	392.3	465.5	16.8
1935	87.9	362.0	449.9	17.0
1936	97.9	325.4	423.3	19.4
1937	105.1	302.1	407.2	18.1
1938	107.7	296.6	404.3	15.4
1939	135.7	269.4	405.1	18.7
1940	143.0	298.7	441.7	17.5
1941 2/	142.2	307.0	449.2	

Compiled from data of the Agricultural Marketing Service. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.

1/ Stocks of continental types held by dealers and manufacturers. Complete data on farm stocks which are significant in some years and for some cigar types are not available. Stocks for types 45 and 62 are as of July 1.

2/ September 1 estimates.